CHRIS HR USERS' MANUAL

Version 4.1 February 2002

Based on PeopleSoft Version 8.0

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1 Introduction to CHRIS

The Corporate Human Resource Information System (CHRIS) evolved from a corporate strategic planning process where Department of Energy's human resource (HR) community recognized the need to operate its HR programs more efficiently, reduce paperwork, and eliminate redundant and non-Y2K compliant information systems. CHRIS capitalizes on the latest information technology for meeting the Department's core and priority human resource mission functions.

Effective September 27, 1998, CHRIS became the Department of Energy's official personnel system of record. CHRIS replaced the PERS portion of the DOE's legacy PAY/PERS system. Other than the last official action on or before the implementation date, historical personnel actions were not loaded in CHRIS. Personnel actions can be processed in CHRIS as they are received, regardless of the effective date. Certain payroll-related benefit documents, such as health benefits and Thrift Savings Plan, are processed in CHRIS by the Payroll Office. Personnel data processed in CHRIS is interfaced with the Department's current payroll (PAYS) system. Security access and integrity of CHRIS are supported through the use of user identifications and passwords to prevent unauthorized use of the system and databases. The system incorporates edit and warning messages and validates certain employee data based on tables to ensure data integrity and the accuracy of the personnel actions and reports generated.

Currently, CHRIS is being utilized to process SF-52's and SF-50's. Eventually CHRIS will be used to:

- ⇨ Align core HR needs and practices across the DOE community;
- ⇨ Consolidate personnel data into a single integrated system; and
- ⇨ Provide better information for improved decision making.

CHRIS will enable:

- ⇨ Managers and supervisors to access real-time personnel data from their desktops;
- ⇨ Managers and supervisors to initiate personnel requests and receive notification of their processing electronically (i.e., SF-52's and 50's will be done on-line);
- ⇨ Enable employees to view and enter their own personal data and make changes to their benefits information;
- ⇨ Provide personnel forms on-line and automate certain notification processes.

<u>About this User Manual</u>

The CHRIS Users' Manual provides the proper procedure and step-by-step instructions for processing personnel actions and performing other related activities in the automated system, such as generating reports and ticklers. This manual should be used as a supplement to the documentation and processing guidance on preparing actions contained in Office of Personnel Management (OPM)'s Guide to Processing Personnel Actions, as well as Departmental and collective bargaining unit agreements. CHRIS HR Bulletins are issued when information needs to be transmitted immediately.

2 CHRIS Basics

Contents

2.1 Key Concepts

CHRIS Environment

The CHRIS database is physically located at the National Energy Technology Laboratory (NETL) in Morgantown, West Virginia. It is accessible to DOE sites across the country through web technology. This technology involves storing the database on a large computer (referred to as the “database server”). Also setup at this site is a system of Application Servers, Batch Servers, Web Servers and a Report Repository. Each site has access via DOENet to the database through the web hitting one of two Web Servers. These Web Servers pass information requests through the Application Server. The Application Server then sends the requests on to the Batch Server or database server for processing. The reporting results get transferred over to the Report Repository for user access via the web. This technology combines the power of main frame computing with the ease and speed of the web. Because PeopleSoft uses Structured Query Language (SQL) when you access the database, you are requesting and receiving only the specific data you need at that time not the entire database.

Relational Database

CHRIS is a relational database built using the PeopleSoft Federal Version 8.0. In its simplest sense, a relational database is a **series of tables linked by key fields.** The advantage of a relational database is that you only have to enter data into a table once and it will automatically populate related fields. This saves time and decreases potential data entry errors.

Tables are the foundation of the database. Each table is **comprised of columns and rows like a spreadsheet**. The columns in each table are the fields you see in pages as you enter data in the program. The rows of the table are the records and contain the entries that you make in each field.

Column (Field)

	Emplid	Name	Street	City	State
Row (Record)	100	Rodriquez,Anna	897 Cavalry	Arlington	VT
	101	Stream,Daniel	325 Lennon	Rockville	MD
	102	Eggert,John	305 Maple	Alexandria	VA

Each table has a unique name and is linked by key fields to create the relational database. Foundation tables are updated by the system administrator only. Whenever you process actions, ***you*** are actually changing/creating records in the database.

Effective Dates

Rows of data (or records) in a table are effective dated. This means a date is attached to the record that tells the computer and the user **the date the record goes into effect.**

CHRIS uses three types of dates to manage DOE records:

- ***Future:*** data rows that have effective dates greater than the system date;
- ***Current:*** the data row with the most recent effective date closest to today's system date—but not a future date. Only one row is the current row; and
- ***History:*** Data rows that have effective dates less than the current data row.

This effective date arrangement provides three benefits to DOE:

First, it enables the Department to maintain a complete chronological history of all personnel and position data. With this information at our fingertips, we can roll back the system to a particular time to ***perform analyses***. Or we can roll it forward to project the impact of future actions on the organization.

Second, the system uses the effective date to determine which records are operational. This means ***you can actually enter actions before they become effective.*** You just have to be sure to enter the date on which the system should recognize the effective date of the action.

> **For example:** In July, you enter information for a promotion that is not effective until September 1 (a future action). On September 1, the system will recognize the action as the current/operational data and the previous record concerning that person becomes the historical record.

Third, you can process ***more than one action effective the same day.***

> **For example**, you could enter a promotion and a change in work schedule to be effective the same day and the system will automatically assign a sequence number to each action. It is the user's responsibility to determine the order in which the actions should be processed.

2.2 Key Features

Menus

Menus provide the list of processes and their associated pages. The menus pull down from the menu bar. The types of menus available vary from window to window.

Pages

Each menu option (process) opens into a page. Pages are the screens on which you enter data into the database. They are comprised of fields that:

- ⇨ have been filled in (populated) by data already present in the database;
- ⇨ have valid values available for you to select from a pull down list; or
- ⇨ have blanks for you to insert the appropriate information.

You move between pages by clicking on the scroll bar or the folder tabs along the top of the page.

You must complete all the required fields in a page before it will allow you to save.

Field

A field is the point of data entry on a page. It is comprised of a label and an entry blank. The label references the column of the associated table. The entry blank is where you physically enter/modify data, either by typing or by selecting a valid value from a list.

Row

A row is a portion of the database in which you enter data to form a record. Each row has an effective date associated with it. It is possible to enter multiple rows in certain fields. **For example**, under the field "Remark CD" you enter a separate row for each remark, i.e., one row for a K16, one row for a K20, etc. You can move between the various rows for that field by using a scroll bar or left and right arrows.

2.3 Navigational Techniques and Tips

Techniques

The following are ways to help you get around CHRIS as efficiently as possible. Frequently, there is more than one way to get to where you want to go.

Cursor	Simply **use the mouse** to move the cursor to wherever you want to enter data or **select an item** and click. This is not usually the fastest way to navigate; though sometimes it is the only option.
Tab/Shift+Tab	This is the best way to **move between fields on a page**. To move forward, use tab. To move backward, use shift+tab. Note that options selected from valid value lists or pull down menus may not appear until you have tabbed to the next field. When you use tab to move between fields, the field is highlighted as you move into it, which allows you to type over existing data.
Save	Save after you have completed an action. If you try to save before the action is complete, you are likely to get an error message telling you that required fields are missing. You must go back and fill in the required fields before the system will allow you to save.
Scroll Bar	Use the scroll bar **to move between rows** of data for any given field.
Magnifying Glass	These appear at the right side of fields. Click on them once and they will reveal a **list of valid values** for that field. Use these whenever they are available rather than keying in the data. Frequently it is faster, and it avoids data entry mistakes.
Advanced Search	Enables you to narrow a search by entering more than one search criterion. It provides fields for you to enter known data that will narrow the options provided in a valid value box. **For example**, if you are trying to locate a record for an employee named Smith and the system has 50 Smiths in it, you can use the *Advanced Search* and enter other data that will narrow the options so that you don't have to scroll through all 50 names.
New Window	To open more than one window, choose "New Window". The window you were previously working on will minimize at the bottom of you desktop. This option will allow you to toggle between processes.
Breadcrumbs	Display the path used to navigate throughout menu options.
View All	Allows you to view multiple rows of data all together as opposed to using the scroll bar to view multiple rows individually.
< or >	Allows you to scroll through a record one transaction at a time
First	Allows you to view the most recent transaction within a record.
Last	Allows you to view the oldest transaction within a record.
+	Used to add a row of data.

-	Used to delete a row of data.
Include History	Used if you want to view all rows within a record but only want to insert or change future rows.
Correct History	Used to view all history, current & future rows or correct or delete an action with a PAR Status of REQ.
Date Prompt	This is a button next to a date field that presents a calendar with the (current) system date displayed. You can change the month and year by clicking on the arrows in the calendar. This option can be used instead of manually typing in a date field.

Tips

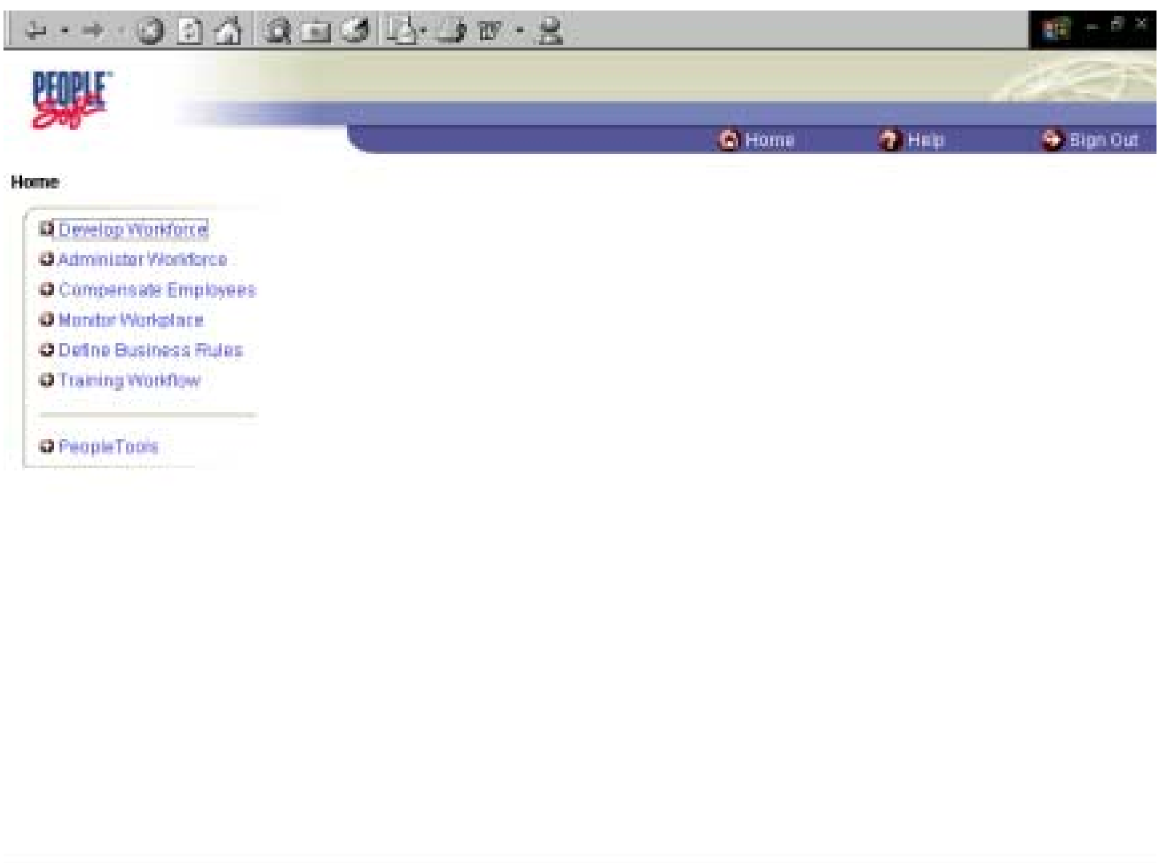
The following are a few reminders to help you along the way.

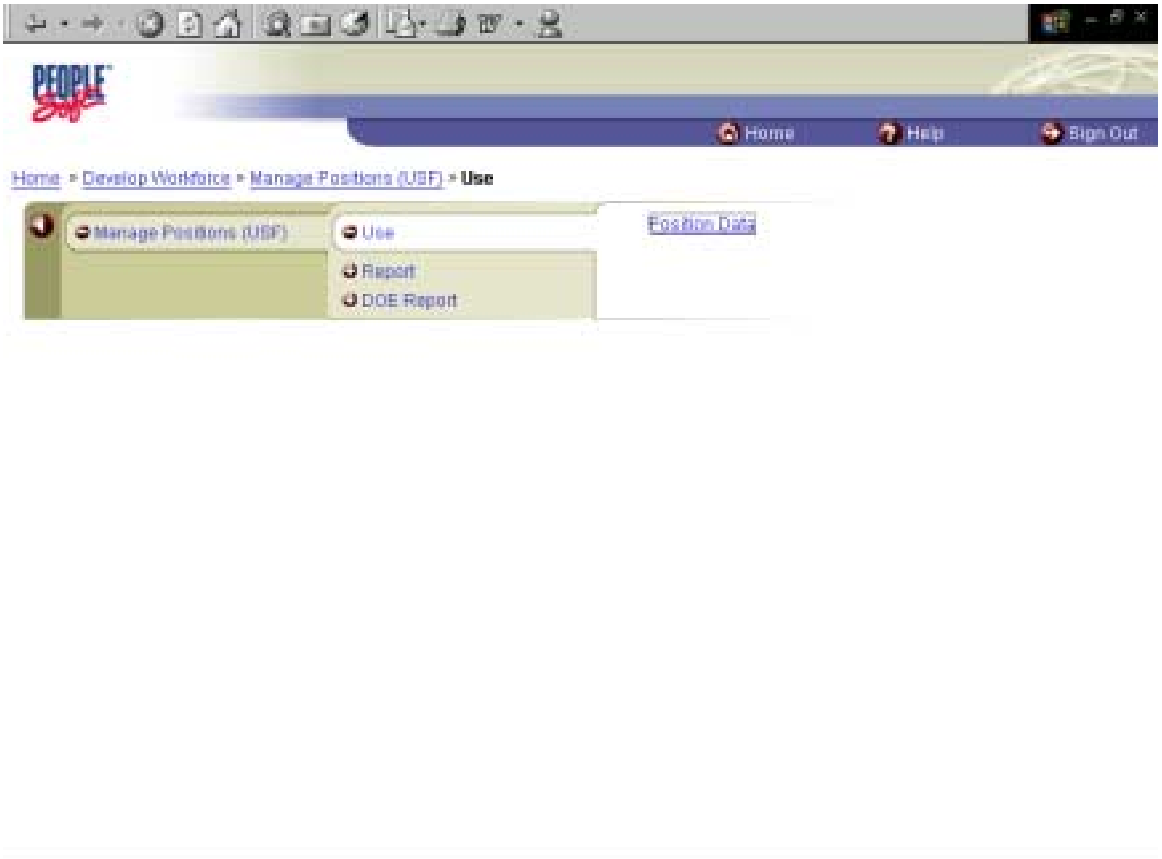
Preserve Old Records	Be sure you insert a new row whenever you enter a change. You do not want to literally change the data in the pages because you want to preserve the historical record. You want to insert a new row and enter the new information under the new effective date. It's the effective date that determines which record the system uses as the valid current data.
Find a Valid Value	If you are having trouble finding a valid value and the pull down list associated with a field is too long to read through, Click on the magnifying glass. This will bring up a dialogue box that will help you identify and limit the number of options available.
Tab Between Fields	This is the safest way to get around a page. It will also prevent you from skipping over a required field.
Avoid Typing	Whenever the option is available, use the magnifying glass to select valid values. This will frequently be quicker than typing and will prevent you from making data entry errors.

2.4 CHRIS Pages

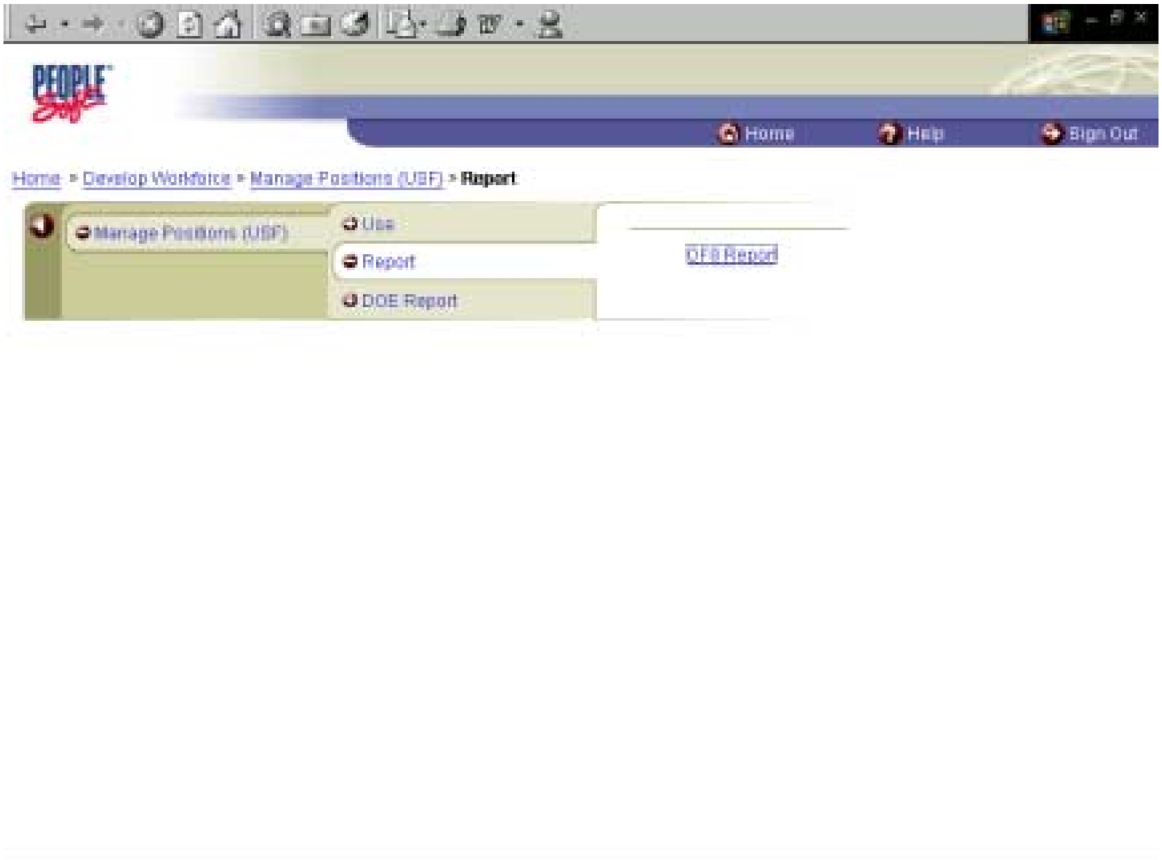
You will have access to the following menus:

- ⇨ **Develop Workforce**, where you will access **Manage Positions** to create or modify position information.
- ⇨ **Administer Workforce**, where you will process all personnel actions, enter employee review and education information, as well as review records.
- ⇨ **Compensate Employees**, where you will access **Administer Base Benefits** to view benefit information.
- ⇨ **Monitor Workplace**, where DOE Reports are listed.
- ⇨ **Define Business Rules**, where DOE Reports are listed
- ⇨ **PeopleTools**, where you run queries and access the Report List for printing.

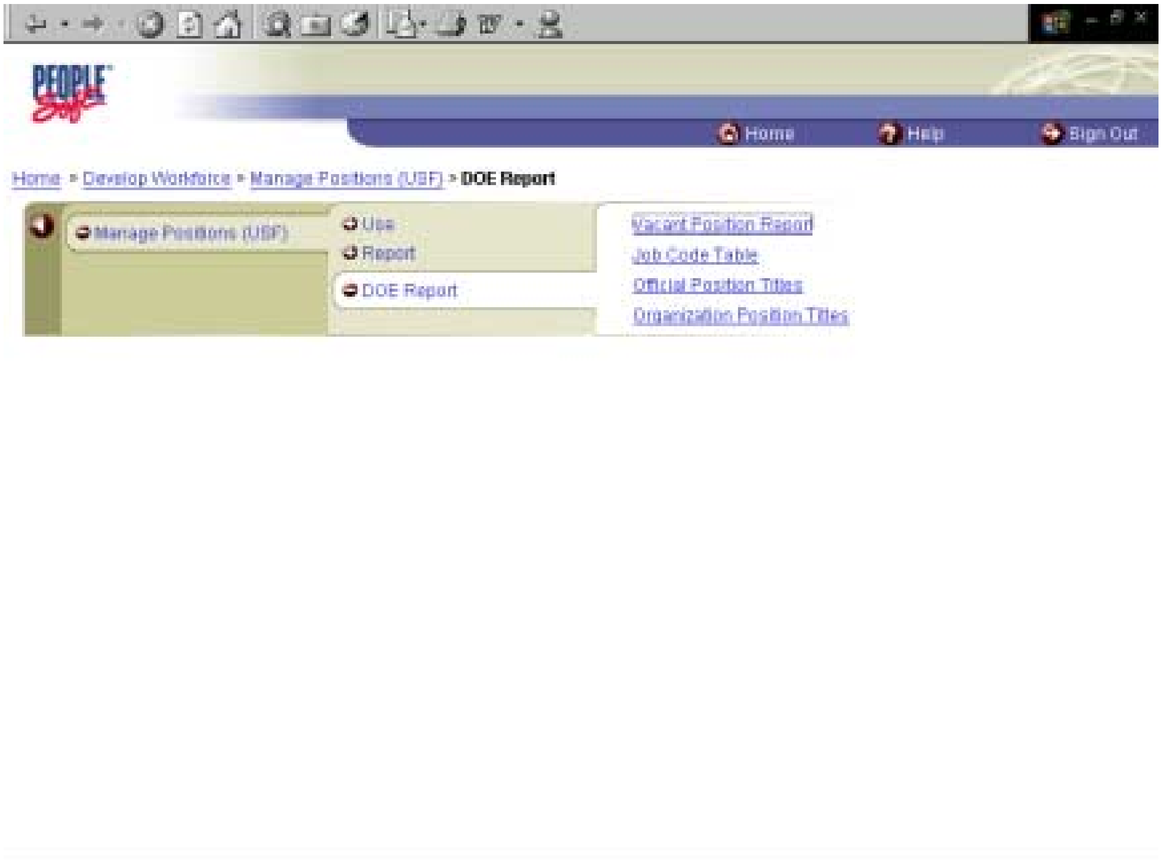




USE is where you create or modify position information.



REPORT is where you have the option of printing an OF-8.



DOE Report is where you may generate the following reports:

- ⇨ **Vacant Position Report**
- ⇨ **Job Code Table**
- ⇨ **Official Position Titles**
- ⇨ **Organization Position Titles**

The **USE** menu is where you select the process that you want to perform.

The **Request Hire** option is where you will process new hire actions.

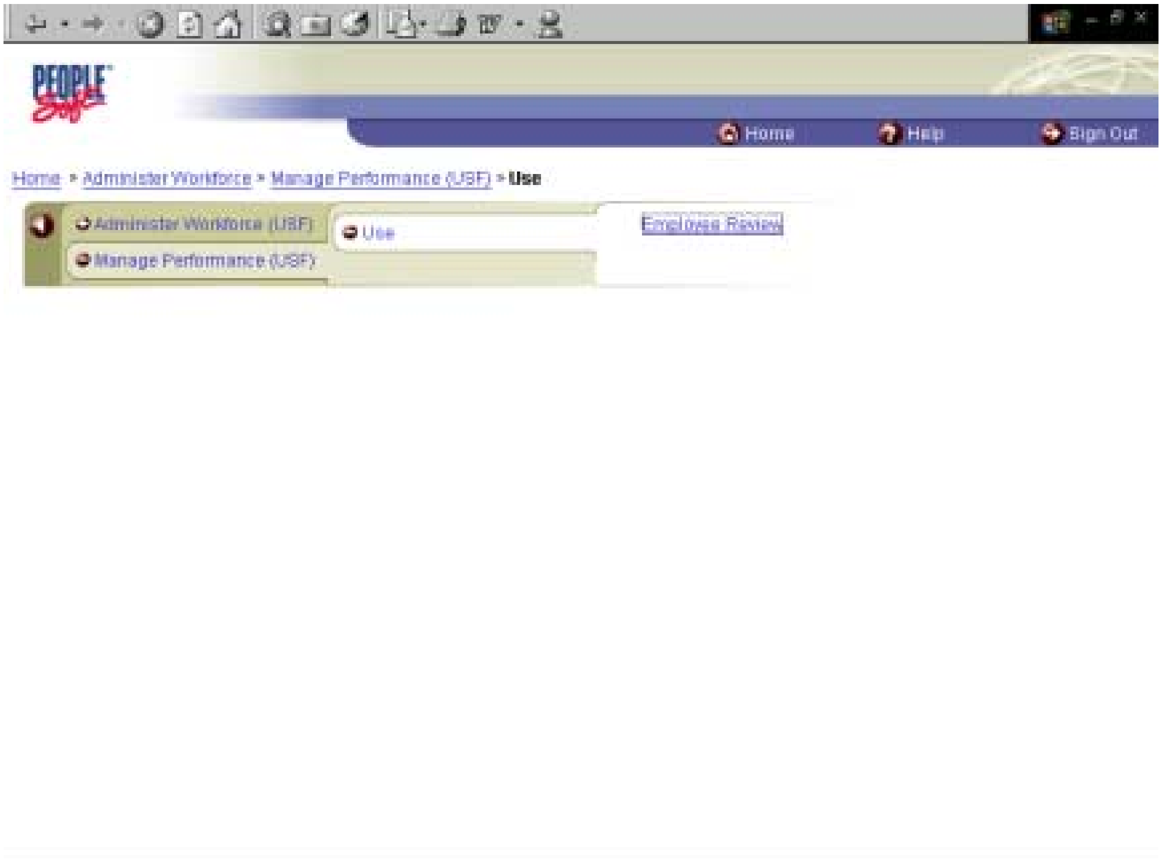
Education is where you will process changes/additions to employees' education information.

Address Changes is where you update employee addresses and phone numbers.

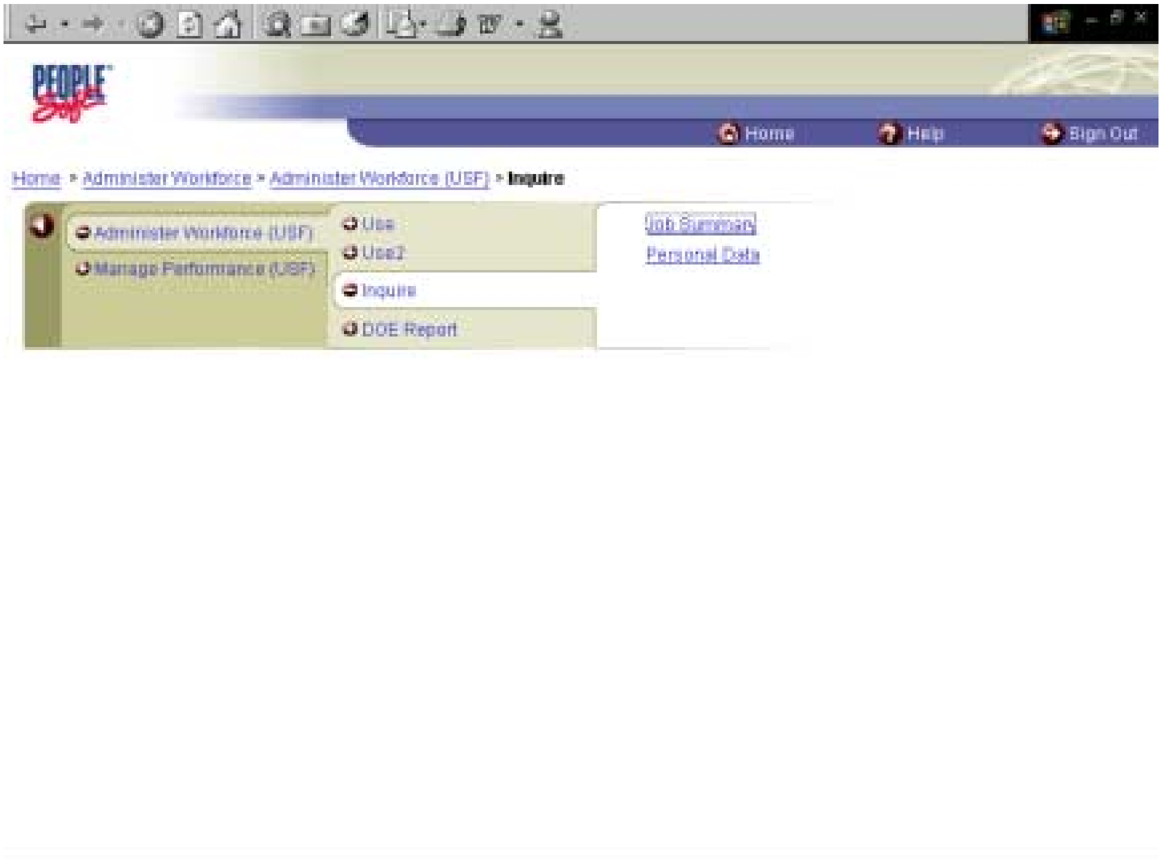
WGI NonPay Hours is where you view nonpay hour balances.

Request Action is where all other personnel actions are processed.

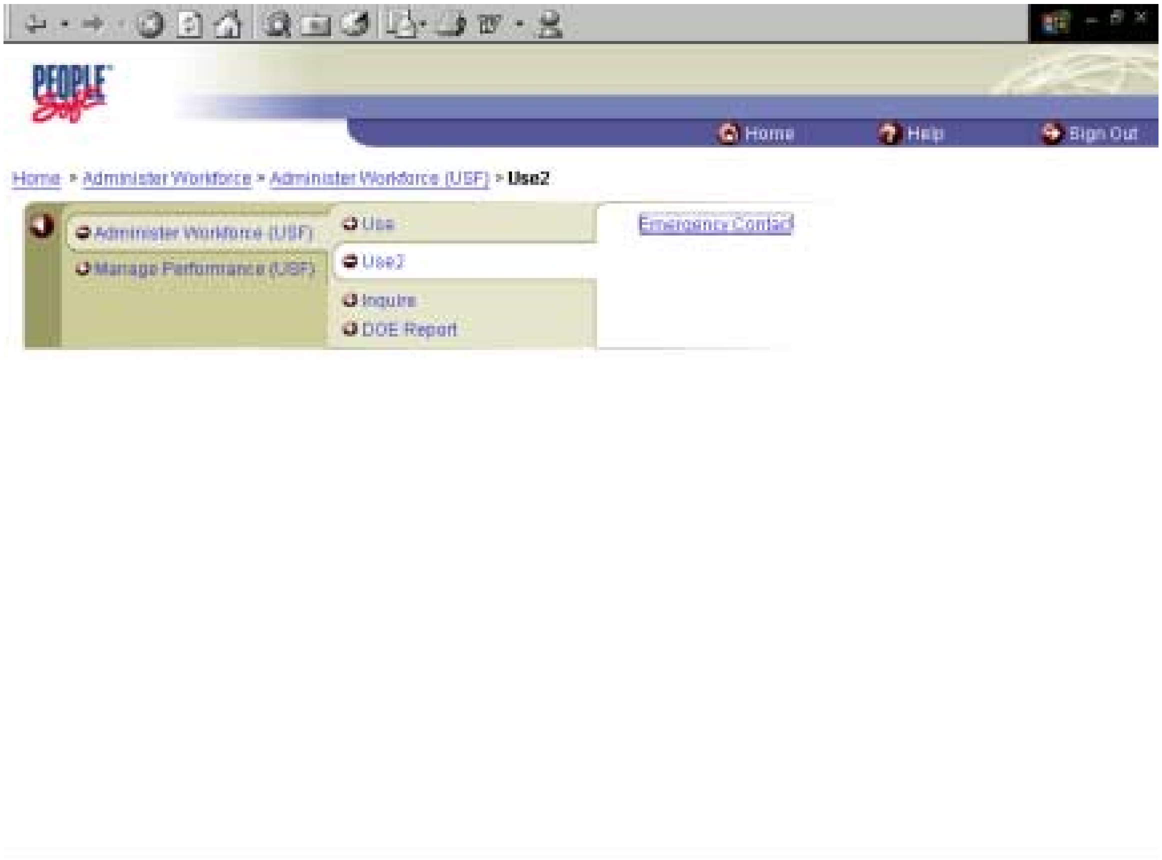
Correction and **Cancellation** are the options to process those types of actions.



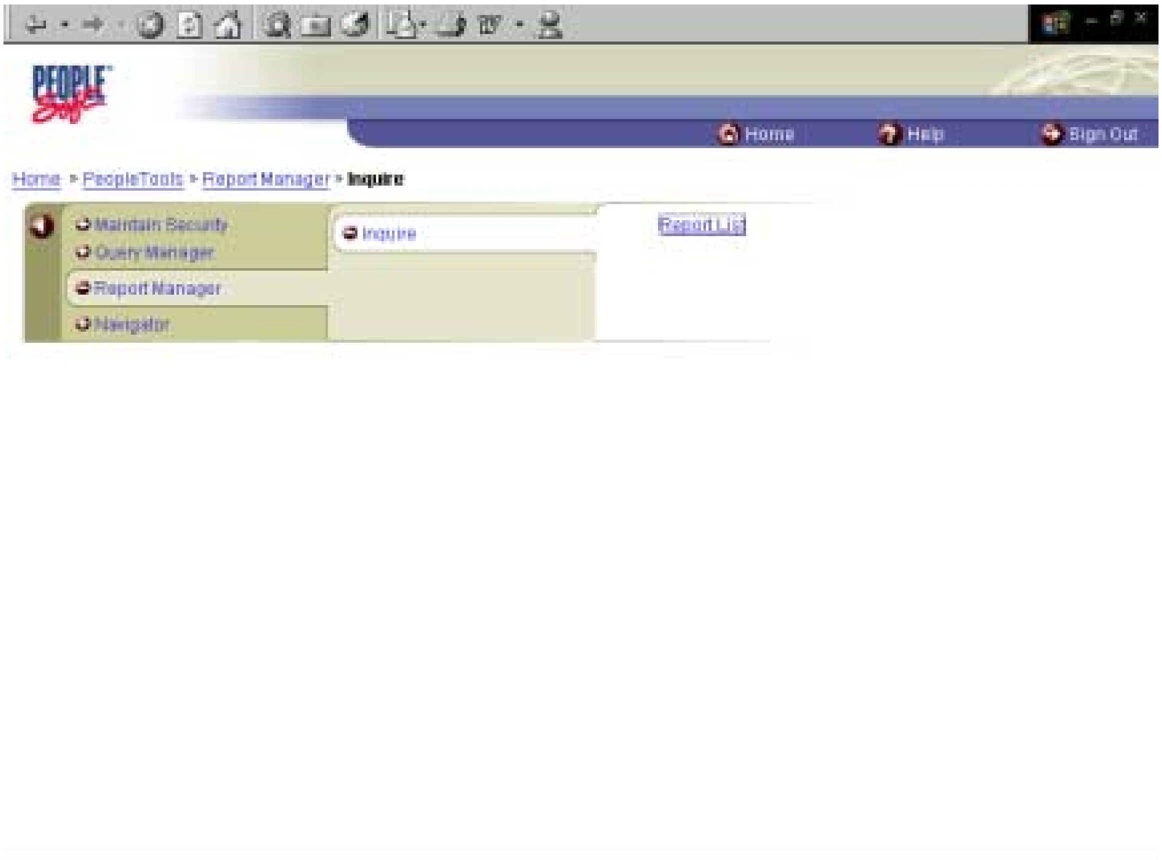
Under **Manage Performance**, **Use**, is where you enter *Employee Review* information.



INQUIRE is where you can view **Job Summary** or **Personal Data**.



EMERGENCY CONTACT, Use 2 is where you can view or enter **Emergency Contact** information.



Report Manager is where you view print jobs.

3 General Procedures

Contents

3.1 Position Information

One fundamental aspect of CHRIS is that personnel data is managed by position rather than by employee. In driving the system by position, we attach data to the positions and move employees in and out of those positions. We can use the data specific to each position as the basis for organizational planning, recruitment, and career planning. This is appropriate for Federal positions as the duties, responsibilities, pay and other factors are determined by the position, not the incumbent.

CHRIS positions are not abolished; they can be inactivated when vacated and re-activated if needed at a later date.

In CHRIS:

- ➪ ***Position*** is system assigned. **The user will never create this number.**
- ➪ ***Job Code*** is a number the user selects from a library of Job Codes that are assigned by the CHRIS Functional staff. **The user will never create this number.**

The 15 variables used to identify the Job Code in CHRIS are listed below:

Select only the job codes within your sub-agency.

Personnel Office Identifier
Sub-Agency
Pay plan
Series
Grade
Title
FLSA
Manager Level
Functional Class
Pay Table
Financial Interest
Executive Disclosure (SES, Schedule C, EX, SL, ST, EJ Lvl 5, EK Lvl 5, CA, AL)
Position Sensitivity
Pay Basis
PATCOB

While working in CHRIS, if you discover that the database ***does not*** contain a match for the 15 variables you have identified for a position, you must complete the required request form to obtain a new Job Code. This form can be found in this chapter and on the CHRIS Homepage at chris@inel.gov. Once the form is completed and faxed to the CHRIS Functional Hotline, the Job Code will be created in the database and your fax will be returned with the newly assigned Job Code number.

How to Inactivate a Position

After processing an action that moves an employee out of a Position, the Position should be inactivated. Follow the steps below to inactivate the Position.

Develop Workforce > Manage Positions (USF) > Use > Position Data

1. Enter the **Position**.
2. Insert a row (+).
3. Change the **Effective Date** to reflect one day after or later than the date the position is vacated.
4. Change **Status** to "*Inactive*".
5. Save.

How to Reactivate a Position

If you are processing an action that moves an employee into an inactive position, you will need to reactivate the position as follows:

Develop Workforce > Manage Positions (USF) > Use > Position Data

1. Enter the **Position**.
2. Insert a row (+).
3. Change the effective date to reflect the same day that the new action is effected.
4. Change **Status** to "*Active*".
5. Change any other data in the position as necessary.
6. Save.

How to Reuse a Position

An example of this would be when you are re-using a Position for a career ladder promotion:

Develop Workforce > Manage Positions (USF) > Use > Position Data

1. Enter the **Position**.
2. Insert a row (+).
3. Change the **Effective Date** to reflect the same day that the new action is effected.
4. Change the position as necessary.
5. Save.

Potential Problems with Assigning Multiple Employees to Same Position

Currently, there is no edit that prevents a CHRIS user from assigning more than one person to the same ‘position’. This practice will negatively impact certain information in CHRIS as well as other related systems. Below are some of the known issues.

- **"Reports to Position" Not Updating Correctly on Personnel Transactions**
  The CHRIS system has been modified to update/refresh the "Reports to Position" number and the Supervisor’s Emplid on the Employment 1 page from the Position Data record as personnel transactions that involve new or refreshed positions are processed. When more than one supervisor is assigned to a Position, there is insufficient information for the system to determine the proper supervisor. These fields are grayed out on personnel transactions and the user cannot update the information manually.

- **Mass Processing – Realignments & Change in Organization Name Actions**
  There is a risk of serious discrepancies in the CHRIS system between the Position Data record and personnel transactions during mass processing of realignments and organization name changes when a Position is shared by two or more employees. Since a position can reside in only one Department ID, some employees may end up without a valid Position Data record following the mass processing. The programs used for mass processing would have to be changed significantly to include extra checks and balances to eliminate the possibility of the discrepancies discussed above.

- **DOE Phone Book – Identification of Department Managers**
  The CHRIS system provides organization names, organization hierarchy and department managers for the DOE Phone Book. When more than one employee is assigned to the manager’s position number for a given Department ID, the system has no way of determining which employee is the current manager. As a result, the DOE Phone Book will contain missing or invalid information.

- **Impact Upon Implementing Future CHRIS Modules**
  Dual occupancy of positions in CHRIS may also create problems upon implementation of future CHRIS modules such as Recruitment and Succession Planning. The full impact is not known at this time.

It is strongly recommended that a one-to-one relationship always exist between the position and the employee, including an employee serving on a temporary promotion. If you have questions concerning this information, please contact the CHRIS Functional Hotline at (304) 285-1310.

Creating a Position

Develop Workforce > Manage Positions (USF) > Use > Position Data

Click on **"Add a New Value"**

Click on **Add** and it will automatically assign a position number when the position is saved.

🗀Description

1. The **Effective Date** and **Status Date** will automatically default to the current (system) date. The effective date of the position must be on or before the effective date of the action for which the position is being created.
2. The **Reason** defaults to **NEW**-New Position.
3. Select the **Job Code** (Click on the magnifying glass to search for variables **- Pay Plan**, **Pay Table**, and **Grade** will default from the **Job Code**. When processing retained grade actions, the **Job code** should reflect the position to which the employee is being assigned – <u>not</u> the position they came from in the retained grade.
4. The **Reports To** field will autopopulate based on the selection of the **Department** once it is entered on the **Work Location** page. If it does not autopopulate, click on the magnifying glass to search for the appropriate Position of the head of the Department or Supervisor of the employee for which the position is being created. If the supervisory position is not yet established, leave the **Reports To** blank. Notify the CHRIS Functional Hotline when the **Department** head/supervisor position is established. If the **Department** head/supervisor position is vacant, but has been established in CHRIS, it must be entered in the **Reports To** field.

US Federal Flag

1. Enter **Occupational Series**
2. Enter the **Organization Posn Title Cd** (Click on the magnifying glass to search)
3. Enter the **Position Occupied**
4. Enter the **Competitive Area**
5. Enter the **Competitive Level**
6. **Date Position Established** will default to system date. Change to the date the position was classified.
7. If the position is temporary, enter **Not to Exceed Date**

🗀Work Location

1. Enter the **Department**.
2. Enter the **Location Code** (Click on the magnifying glass to search).

US Federal Flag

1. Enter **Position Location –** (default is Headquarters) **---**if the position is located in the field, select (Field).
2. **Personnel Office ID** and **Sub-Agency** will default based on the selection of the **Job Code**.

🗀Job Information

1. Enter **Reg/Temp**. (This field indicates the status of the position, not the incumbent of the position.)
2. Enter **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.

US Federal Flag

1. Enter the **Bargaining Unit** (default 8888)
2. Enter the **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.
3. Enter the **Fund Source**.
4. **FLSA Status** will default from the **Job Code**.
5. Enter **Target Grade**.

🗀Specific Information

US Federal Flag

1. Enter **Security Clearance**.
2. Enter **LEO/Fire Position** if applicable, otherwise the SCD for LEO will not ungray on the employee's record.
3. Click on the checkbox next to: **Seasonal, Drug Test (Applicable), Intelligence Position, Mobility Position, Procurement Integ Posn, Presidential Appt Posn** if any of these are applicable to the position.

🗀Return to Description

1. Review the **Reports To Posn** field. The **Reports To Posn** field will autopopulate based on selection of **Department**. If it is not populated, Click on the magnifying glass to search for the appropriate Position of the head of the department or supervisor of the employee for which this position is being created. If the supervisory position is not yet established, leave the **Reports To Posn** blank. Notify the CHRIS hotline when the department head/supervisor position is established. If the department head/supervisor position is vacant, but has been established, it must be entered in the **Reports To Posn** field.
2. Save.
   If the Reports To position entered is inactive or unoccupied, you will receive the following warning message: "The "Reports To" position identified is not an active and/or occupied position." If you receive this warning, it is recommended that you re-enter a new Position that is active and occupied.
3. ***Be sure*** to make a note of the Position assigned as you will need it to finalize your action.

Modifying A Position

Administer Workforce > Manage Positions (USF) > Use > Position Data

🗀Description

1. Select the **Position**.
2. **Insert** a Row (+).
3. Enter **Reason**.
4. Review/Change the **Job Code** (Click on the magnifying glass to search for variables **- Pay Plan**, **Pay Table**, and **Grade** will default from the **Job Code**. When processing retained grade actions, the **Job code** should reflect the position to which the employee is being assigned – not the position they came from in the retained grade.
5. The **Reports To** field will autopopulate based on the selection of the **Department** once it is entered on the **Work Location** page. If it does not autopopulate, Click on the magnifying glass to search for the appropriate Position of the head of the Department or Supervisor of the employee for which the position is being created. If the supervisory position is not yet established, leave the **Reports To** blank. Notify the CHRIS Functional Hotline when the **Department** head/supervisor position is established. If the **Department** head/supervisor position is vacant, but has been established in CHRIS, it must be entered in the **Reports To** field.
6. Verify **Status** – it may be have been inactivated previously and will need to be changed to **Active**.
7. **Effective Date** and **Status Date** should be on or before the effective date of the action.
8. Select **Reason.**

US Federal Flag

1. **Occupational Series** will default from the Job Code.
2. Review/Change the **Organization Posn Title Cd** (Click on the magnifying glass to search)
3. Review/Change the **Position Occupied**
4. Review/Change the **Competitive Area**
5. Review/Change the **Competitive Level**
6. Review/Change **Date Position Established**. Enter date the position was classified.
7. If the position is temporary, enter **Not to Exceed Date**

🗀Work Location

1. Review/Change the **Department**.
2. Review/Change the **Location** (Click on the magnifying glass to search.)

Federal Data

1. Review/Change the **Position Location** – (default is Headquarters) **---**if position is located in the field, select **(Field)**.
2. **Personnel Office ID** and **Sub-Agency** will default based on the selection of the **Job code**.

🗀Job Information

1. Enter **Reg/Temp**. (This field indicates the status of the position, not the incumbent of the position.)
2. Review/Change **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.

Federal Data

1. Review/Change the **Bargaining Unit** (default 8888)
2. Review/Change the **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.
3. Review/Change the **Fund Source**.
4. **FLSA Status** will default from the **Job Code**.
5. Review/Change **Target Grade**.

🗀Specific Information

US Federal Flag

1. Review/Change **Security Clearance**.
2. Review/Change **LEO/Fire Position** if applicable, otherwise the SCD for LEO will not ungray on the employee's record.

1. Click on the checkbox next to: **Seasonal, Drug Test (Applicable), Intelligence Position, Mobility Position, Procurement Integ Posn, Presidential Appt Posn** if any of these are applicable to the position.

🗀Return to Description

1. Review the **Reports To** field. The **Reports To** field will autopopulate based on selection of **Department**. If it is not populated, Click on the magnifying glass to search for the appropriate Position of the head of the department or supervisor of the employee for which this position is being created. If the supervisory position is not yet established, leave the **Reports To** blank. Notify the CHRIS hotline when the department head/supervisor position is established. If the department head/supervisor position is vacant, but has been established, it must be entered in the **Reports To** field.
2. Save.
3. If the Reports To position entered is inactive or unoccupied, you will receive the following warning message: "The "Reports To" position identified is not an active and/or occupied position." If you receive this warning, it is recommended that you re-enter a new Position that is active and occupied.

Job Code Request Form

Complete form and fax to the CHRIS Functional Hotline at (304) 285-4553.

Effective Date of Action Needing New Job Code	New Job Code	Occu Series	Title	Pay Plan	Pay Table	Grade	Manager Level	FLSA Status	Sub Agency	POI	Pay Basis	Func Class	Sensitivity	Fin Int (Y/N)	Exec Dis (Y/N)	Sch C (Y/N)

Today's Date: ____

Requestor Name: __________________________________

Sub-Agency Name: ____________________________________

E-Mail Address: ___________________________________

Requestor Phone Number: _______________________________

Requestor Fax Number: _____________________________

The on-line job code form is available on the CHRIS website at http://chris.inel.gov/end_user/job_code.cfm and should be used to ensure accuracy and completeness of the information provided.

Request For New Organization Position Title

Complete form and fax to the CHRIS Functional Hotline at (304) 285-4553.

Effective Date of Action Needing New Organization Position Title	New Organization Position Title Code	Organization Position Title	Occup Series	POI	Sub-Agency

Today's Date: ____

Requestor Name: __________________________________

Sub-Agency Name: ____________________________________

E-Mail Address: ___________________________________

Requestor Phone Number: _______________________________

Requestor Fax Number: _____________________________

Job Code Information

Job code: A number selected by the user to identify the position based on the position description.

When requesting a job code, please ***fax*** (do not email) the following information to the CHRIS Functional Hotline. ***All the fields must be completed before submitting a job code request***. Before submitting a request for a new Job Code, check the job code table for your Sub-Agency to be sure one does not already exist.

Information required with definitions:

Occ Series	Occupational Series
Title*	Official classification title of the position. Standard abbreviation table can be found at the end of this chapter. The "&" sign is used for "and" on all classification titles. A maximum of 70 characters. *If organizational title is different from the official title, please submit "Request for New Organizational Position Title with this request.
Pay Plan	Pay plan for the employee that will be assigned to the position (e.g., GS, GM, EX, ES)
Pay Table	Pay table from which employee will be paid (e.g., 0000 for regular GS employees, 0414 for Engineers on the special salary chart): See section of this manual entitled "CHRIS Terms/Codes" for a complete list of Salary Plans.
Grade	Grade of the position
Manager Level	Labor Management Relations (LMR) code *2*= Supervisor or Manager (PAY/PERS code M & S) *4* = Supervisor (PAY/PERS code L) *5* = Management Official (PAY/PERS code P) *6* = Leader (PAY/PERS code W) *7* = Team Leader (PAY/PERS code T) *8* = All others (PAY/PERS codes C, N, R, X)
FLSA	Exempt or Non-Exempt *Exempt*: Professional positions, GS-9 & above Administrative 2-grade interval positions, GS-9 & above Wage Supervisor (WS), General Foreman & higher Supervisors, GS-10 & above *Non-Exempt*: Clerical/secretarial positions, GS-8 & below Professional positions, GS-7 & below Administrative 2-grade interval positions, GS-7 & below Administrative 1-grade interval positions, GS-8 & below Technical positions, GS-8 & below Wage Grade (WG), Wage Leader (WL) & other Wage Board equivalent positions

Wage Supervisor (WS) and other wage system equivalent positions below the General Foreman level
There are some positions for which there will be no clear rule to determine FLSA based on pay plan, grade or supervisory status. This must be determined at each individual site.

Sub-Agency Two character code for your specific site

POI Personnel Office Identifier (4 - 6 digits)

Pay Basis e.g., Per Annum (PA), Per Hour (PH), Per Day (PD)

Func Class Functional Classification code
00 = Not applicable
Use the following codes for scientific and engineering positions only:
11 = Research
12 = Research contract and grant administration
13 = Development
14 = Test and evaluation
21 = Design
22 = Construction
23 = Production
24 = Install/Operations/Maint
31 = Data collection, processing & analysis
32 = Scientific and technical information
41 = Standards and specifications
42 = Regulatory enforcement and licensing
51 = Natural resource operations
81 = Clinical practice, counseling, and ancillary medical services
91 = Planning
92 = Management
93 = Teaching and training
94 = Technical assistance and consulting
99 = Other - Not elsewhere classified

Senitivity Position Sensitivity
1- Non Sensitive
2- Non-critical, Sensitive
3 - Critical Sensitive
4 - Special Sensitive
5 - Moderate Risk
6 - High Risk

Fin Interest* Financial Interest (yes or no): Determine if the employee should complete the Annual Confidential Financial Disclosure Report. *Check the Corporate Business Rules DOE Order 326.8 dated 10-01-01.

Exec Disc	Executive Disclosure (yes or no): For Pay Plans EX, ES, EJ level 5, EK level 5, SL, ST, CA, AL and Schedule C appointments only.
	-OR-
Sch C	Schedule C Appointments **--** CHECK ONLY IF EMPLOYEE IS ON A SCHEULE C APPOINTMENT

When the CHRIS Functional Hotline receives the request, the new job code will be assigned and the form will be returned with the newly assigned job code.

Abbreviations

Abbreviations in CHRIS are to be used in cases where the title exceeds the total field length.

(OA)	(Office Automation)
(Steno)	(Stenography)
(Typing)	(Typing)
Acctg	Accounting
Admin	Administration
ADP	Automated Data Processing
Adv	Advisor
Assoc	Associate
Asst	Assistant
Auto	Automated
Ben	Benefits
Bio	Biological
Bldg	Building
Chem	Chemical
Class	Classification
Comm	Communications
Comp	Computer
Compl	Compliance
Consv	Conservation
Contr	Contractor
Coord	Coordinator
Corresp	Correspondence
Crftsmn	Craftsman
DADS	Deputy Associate Deputy Secretary
Dep	Deputy
Dept	Department
Deptl	Departmental
Dir	Director
Dist	Distribution
Div	Division
DNFSB	Defense Nuclear Facilities Safety Board
ECC	Emergency Communications Center
EEO	Equal Employment Office
Elec	Electric
Elecl	Electrical
Empl	Employee
Emplmt	Employment
Eng	Engineer
Env	Environment
Envl	Environmental
Equip	Equipment
ES&H	Environmental Safety and Health
Exec	Executive
Fac	Facility

Faclts	Facilities
Fin	Finance
Gen	General
Haz	Hazardous
Hlth	Health
Ind	Industry
Inds'l	Industrial
Info	Information
Inst	Instrument/Instrumental
Instl	Instructional
Intergov	Intergovernmental
Int'l	International
Jman	Journeyman
Lab	Laboratory
Labr	Laborer
Main	Maintenance
Mats	Materials
Mech	Mechanic
Mechl	Mechanical
Mgmt	Management
Mgr	Manager
Misc	Miscellaneous
Nat'l	National
NEPA	National Environment Policy Act
Nuc	Nuclear
Ofc	Office
Ofcr	Officer
Opng	Operating
Ops	Operations
Pers	Personnel
Phys	Physical
Pol	Policy
Prgm	Program
Prgms	Programs
Prin	Principal
Proc	Process/Processing
Proj	Project
Prop	Property
Prot	Protection
Pwr	Power
R&D	Research and Development
Refrig	Refrigerator/Refrigeration
Reg	Regulatory
Rel	Relations
Rep	Representative
Repro	Reproduction
Res	Resources
Sci	Science
Sec	Secretary
Spec	Special

Spect	Specialist
Sr	Senior
Stabil	Stabilization
Stafg	Staffing
Supv	Supervisory
Svc	Service
Svcs	Services
Sys	Systems
Tech	Technology
TQM	Total Quality Management
Train	Trainee
Trng	Training

3.2 Basic Operations/Functions

How to Log On

1. Using your internet browser enter the following URL to connect to CHRIS: http://chrisweb.netl.doe.gov/servlets/iclientservlet/chris/signon.html
2. It is recommended that you add this URL to your favorites so that you do not have to enter the URL each time you log on to CHRIS.
3. You will be required to change your password the first time you log on, and every 180 days thereafter. Before logging into CHRIS, please review the DOE-wide password protocol in the section of this manual entitled "How to Change Your Password".
4. Log on to CHRIS with the userid and password provided.

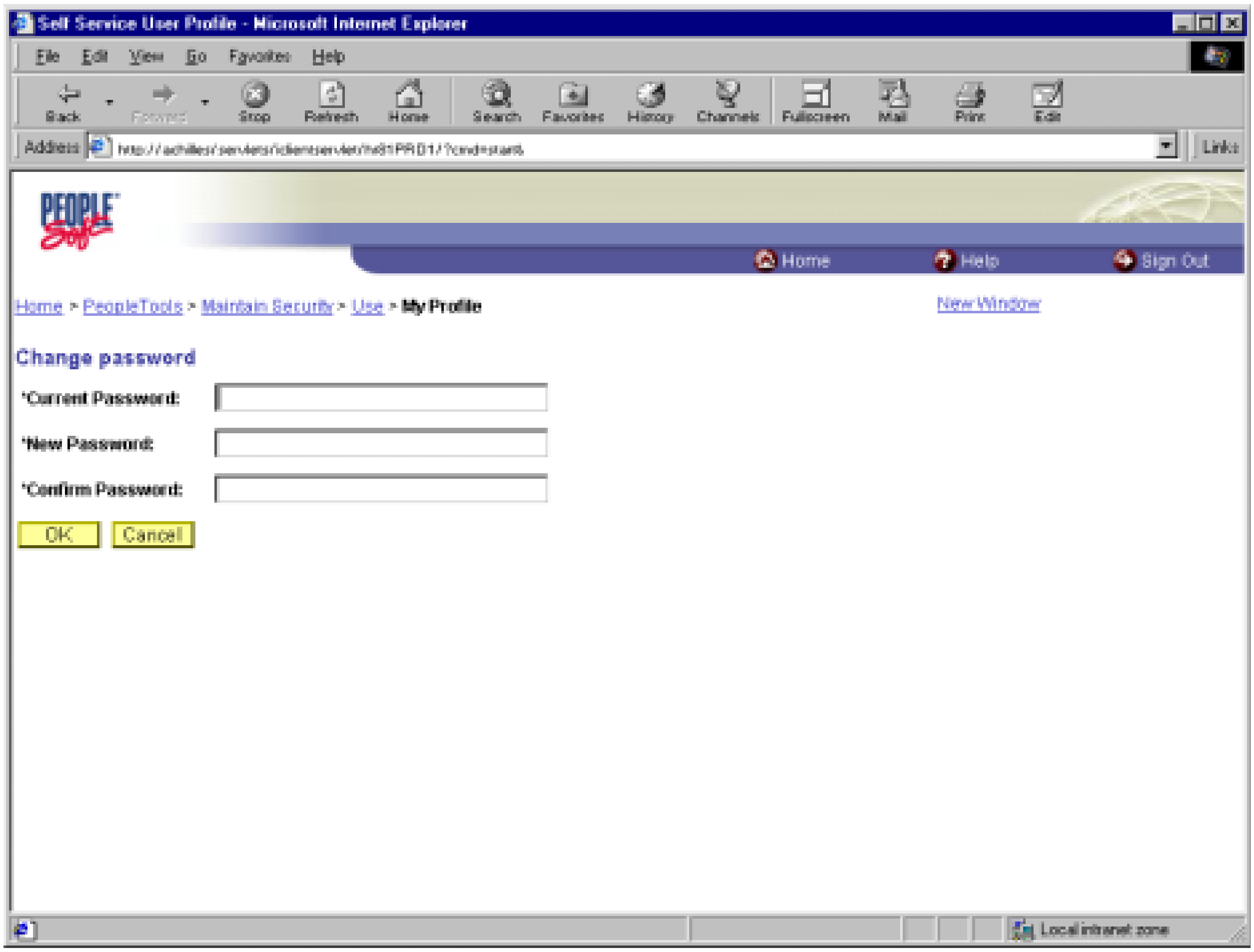
How to Log Off

Click on **Sign Out** in the upper right hand corner of the screen. It is **IMPORTANT** that you click on sign out instead of closing all open windows.

How to Change Your Password

Password Change Instructions

- Logon to CHRIS using your existing password.
- **PeopleTools > Maintain Security > Use > My Profile**
- Enter your current password, then enter and confirm your new password.
- Click **OK**.
- Click **Save.**



Password Construction

- Password contains a minimum of eight non-blank characters. CHRIS allows a maximum of 32 characters.
- Password contains a combination of letters (preferably a mixture of upper and lowercase), numbers, and at least one special character. CHRIS allows use of upper- and lower-case letters, and these special characters:

  ! @ # $ % ^ & * ( ) - _ = + \ | [ ] {} ; : / ? . > <
- Password contains a nonnumeric in the first and last position.
- Password does not contain the user ID. Note: In CHRIS, the "Allow password to match User ID control enables administrators to make sure users don't use their own User ID as a password. This helps you to prevent hackers from 'guessing' passwords based on a list of employee names."
- Password does not include the user's own or, to the best of his/her knowledge, close friends or relatives names, employee serial number, Social Security number, birth date, phone number, or any information about him/her that the user believes could be readily learned or guessed.
- Password does not, to the best of the user's knowledge, include common words, that would be in the English dictionary, or from another language with which the user has familiarity.
- Password does not, to the best of the user's knowledge, employ commonly used proper names, including the name of any fictional character or place.
- Password does not contain any simple pattern of letters or numbers, such as "qwertyxx" or "xyz123xx".
- Password employed by the user on his/her unclassified systems is different than the passwords employed on his/her classified systems.

Password Protection

- Do not leave passwords in a location accessible to others or secured in a location whose protection is less than that required for protecting the information that can be accessed using the password. You wouldn't leave the PIN for your ATM card accessible to others.
- Change your password *immediately* upon receipt from the CHRIS security administrator.
- Change your password *at least* every 6 months.
- Do *not* share your password; but if circumstances otherwise dictate, change your password *immediately* after sharing.
- Change your password as soon as possible, but within 1 business day after a password has been compromised, or after one suspects that a password has been compromised.
- Change your password on direction from management.

Password Controls in CHRIS

- Passwords are set to expire every 180 days. Users who use CHRIS regularly may be warned about the expiration for three days before their password expires.
- After five failed logon attempts, the user's account will be automatically disabled. Contact the CHRIS Security Administrator via email to chris@netl.doe.gov to get the account enabled.
- Passwords are not permitted to match User IDs.
- Passwords require at least one special character and one digit (0 – 9).

Password Examples

- A#U14GJO
- J$IK8LOO

Please change your password on your personal account in CHRIS immediately to conform to these standards. If you have any questions or need additional assistance, please contact the CHRIS Technical Team at (304) 285-4729 or by e-mail to CHRIS@NETL.DOE.GOV.

How to Save

1. Enter all required data to process an action.
2. ***Carefully review each page and subpage***. Check default values and make sure changes were made as appropriate.
3. Click on the **Save**. You will receive confirmation with the word "Saved" at the top right hand side of the page.

How to Print an SF-52

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. With the desired record open, click on the subpage titled "**SF-52**" on the **Data Control** page.
2. *PeopleTools > Report Manager > Inquire > Report List* scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report.
3. Click on **View.** A report log will open displaying the PDF field for your form.
4. Record the **Process Instance number**.
5. Maximize the **Report/Log Viewer** page.
6. On the **Report/Log Viewer** page click on the report with the PDF file extension and this will open Adobe and display your output.
7. Click on the printer icon on the Adobe tool bar and a Print display will appear.
8. Uncheck all boxes under the Copies and Adjustments area so that the forms print properly.
9. Click OK and the form will be sent to the printer.

How to Print an SF-50

SF-50s can only be printed on actions with a PAR status of PRO**.**

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. With the desired record open click on the subpage titled "**SF-50**" on the **Data Control** page
2. You have the option of printing all four copies or a combination of copies. Select or deselect by clicking on the radio buttons and click **OK** to exit the page.
3. *PeopleTools > Report Manager > Inquire > Report List* scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report.
4. Click on **View.** A report log will open displaying the PDF field for your form.
5. Record the **Process Instance number**.
6. Maximize the **Report/Log Viewer** page.
7. On the **Report/Log Viewer** page click on the report with the PDF file extension and this will open Adobe and display your output.
8. Click on the printer icon on the Adobe tool bar and a Print display will appear.
9. Uncheck all boxes under the Copies and Adjustments area so that the forms print properly.
10. Click OK and the form will be sent to the printer. ***Reminder***: If you are printing/distributing the Employee Copy of the SF-50, the employee must be provided the Notice to Employee information that customarily prints on the reverse side of the SF-50.

To print this notice on the reverse side of the SF-50:

- Selct Properties from the Adobde Acrobat print page.
- Select More Options on the Paper tabe
- Click on "Flip on Long Edge"
- Click OK to exit More Options page.
- Click OK to exit Properties page. (Remember to turn off "Flip on Long Edge" option before printing other copies of the SF-50 or reports.

11. Click OK and the form will be sent to the printer.

How to Delete an REQ Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Open desired record.
2. With the REQ Action on your screen, Press (-) to delete the row.
3. Save.

How to Change PAR Status

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. On the **Data Control** page, change **PAR Status** to PRO.
3. Save.

How to Print an OF-8

The **OF-8 (Position Description Cover Sheet)** is a report based on the position information that was built for the position under “Manage Positions” in CHRIS.

Develop Workforce > Manage Positions (USF) > Report > OF-8

1. Select **Add a New Value** the first time only; thereafter, use **Update/Display**.
2. Enter "OF-8" in **Run Control ID** the first time only, thereafter, select "OF-8".
3. Click **Add**
4. Enter the **Position Number** for which you would like a printed **OF-8.**
5. Enter the **As of Date.** *Date must be on or after effective date of position that was created.*
6. **Save**.
7. Click on **Run.** When the Process Scheduler Request screen appears, select **Server Name**: PSNT
8. Verify under **Process List** that the **Type**: Web and **Format**: PDF
9. Click **OK**
10. Record the process instance number.
11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report.

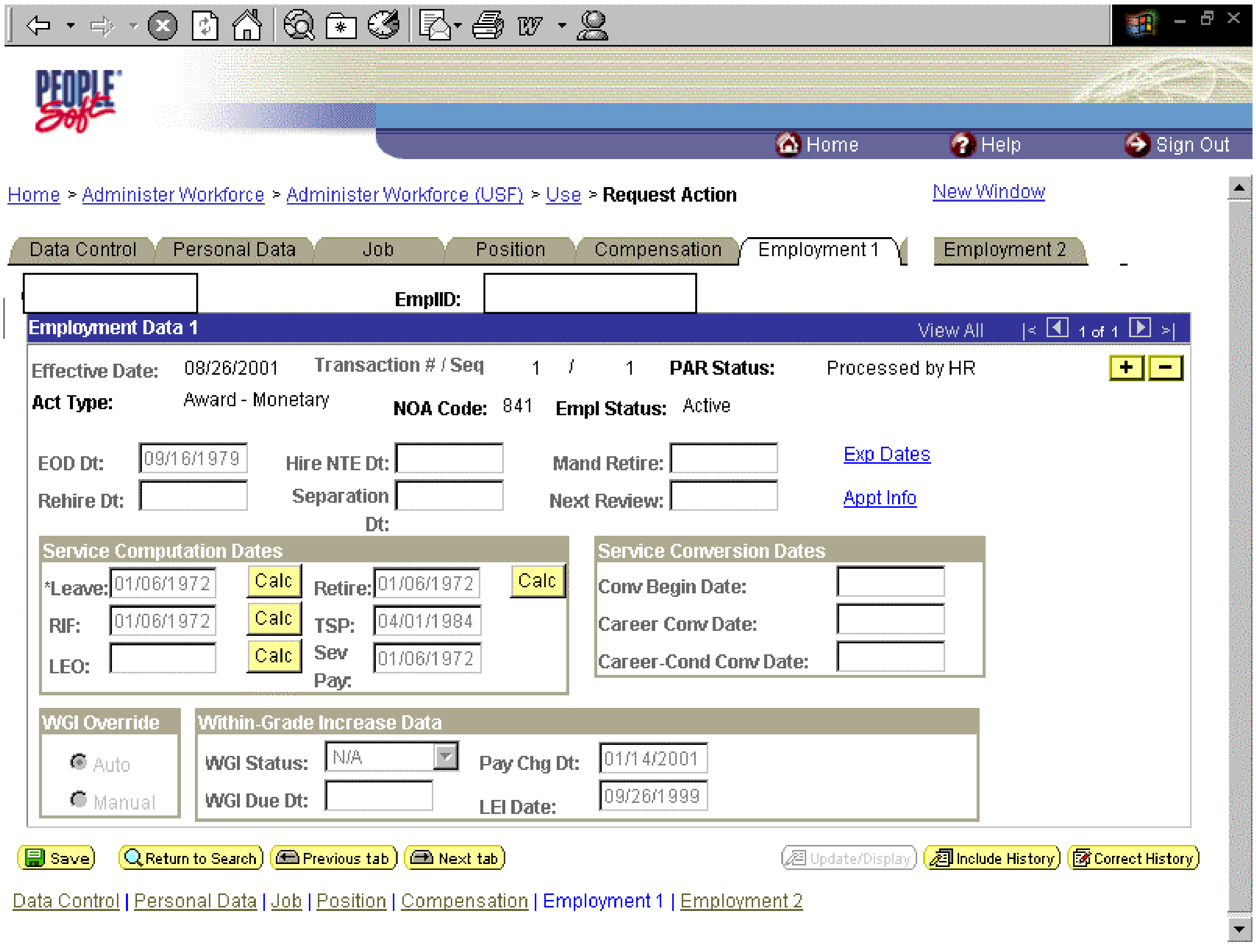
12. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open and display your output.
16. Click on the printer icon on the Adobe tool bar and a Print dialog box will appear.
17. Check to make sure that all boxes under “Copies and Adjustments” area are unchecked so the form prints properly.
18. Check **OK** and the form will be sent to the printer.

REMEMBER: This is only a report **--** there is no way to add or modify the data on the OF-8.

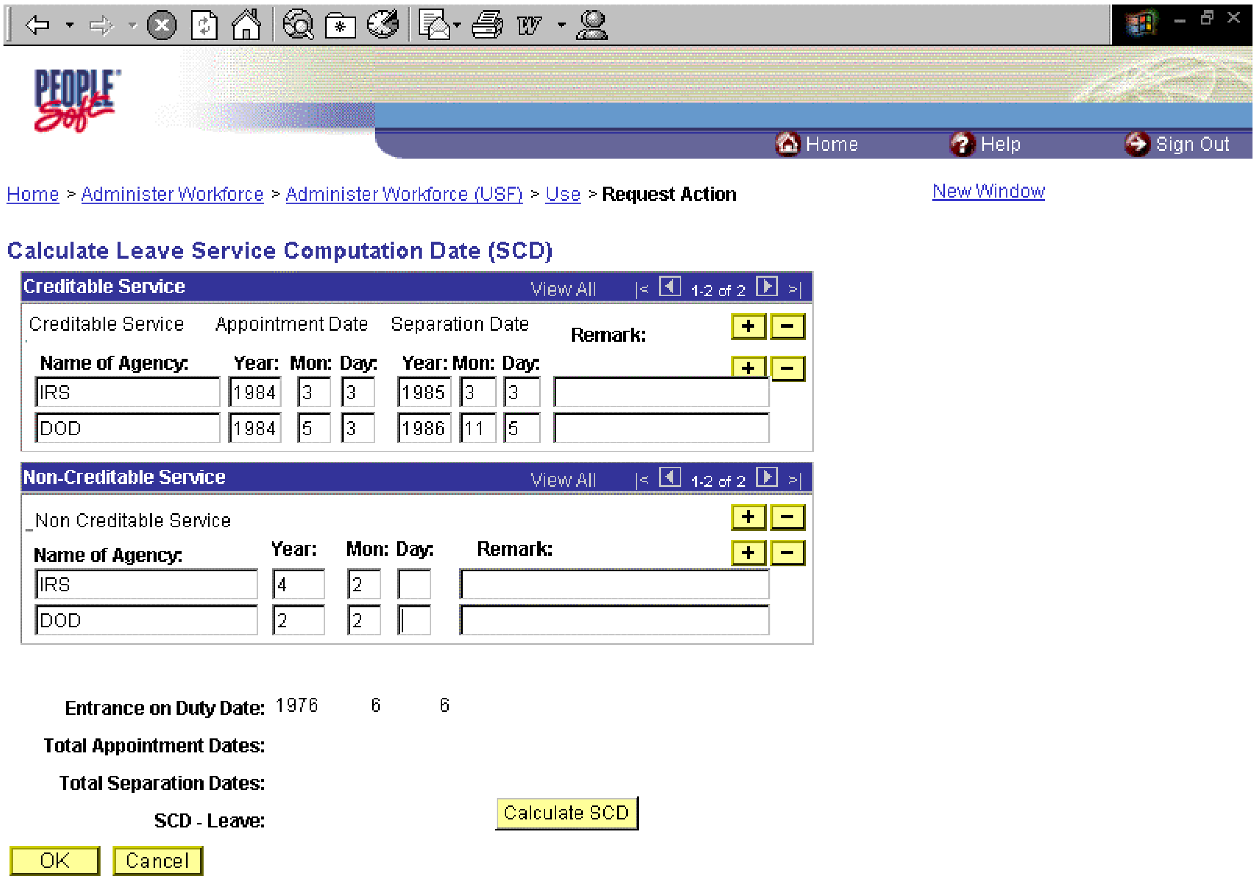
Using the SCD Calculator

NOTE: **This process should only be used on a Hire action, NOA Code 966, NOA Code 002 or NOA Code 882 Change in SCD. This calculator can only be used while the action is in a PAR status of REQ. At no other time should the SCD dates be changed.**

Administer Workforce > Administer Workforce (USF) > Use Request Action > Employment 1

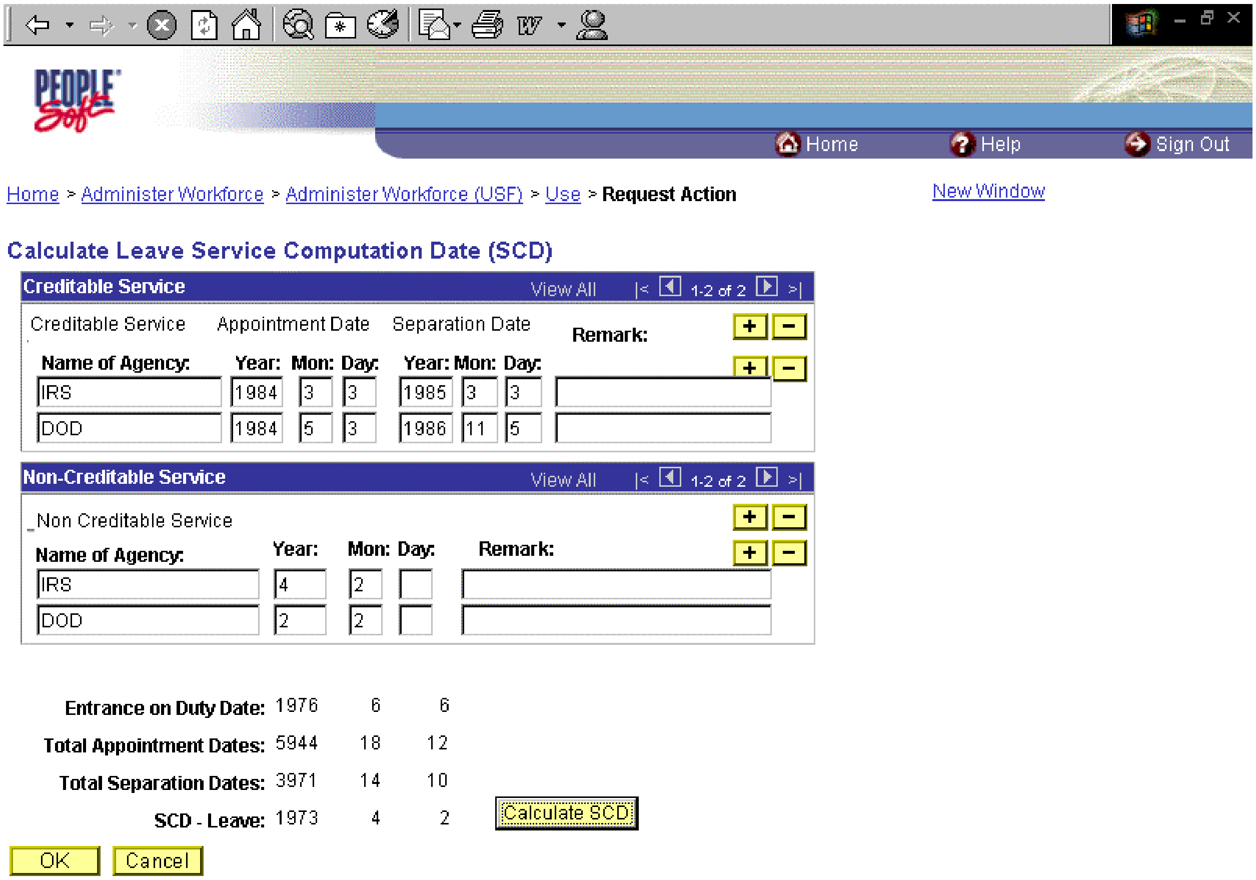


Depending upon which SCD date you wish to calculate, press the "Calc" button next to the desired SCD date to calculate a new SCD.



Note: In order to change, delete or insert additional creditable or non creditable service, the record CANNOT have a PAR status of PRO. The PAR status can only be REQ or COR (NOA Code 002).

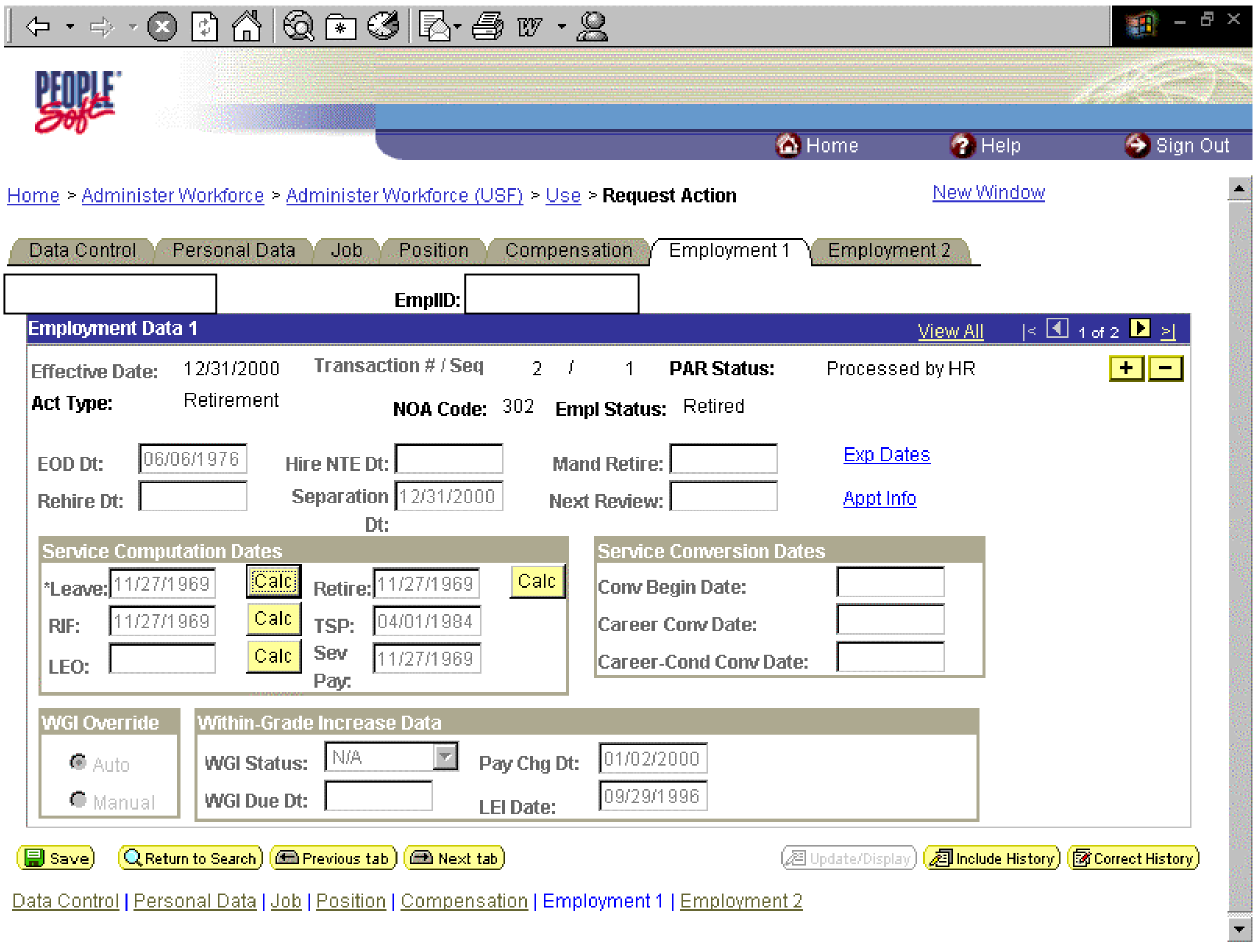
To add more than one period of service for Creditable and Non Creditable Service, press (+) to insert a new row for each of those periods. Once all the service history has been entered, press the "Calculate SCD" button to calculate the new SCD date. Make a note of the newly calculated SCD from this page.



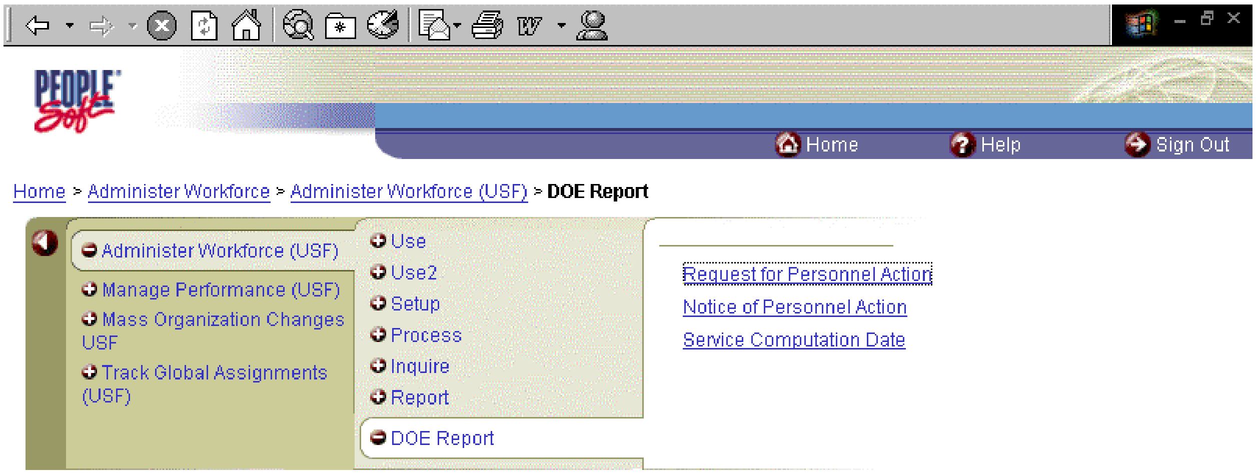
Then press the “OK” button to return to the Employment 1 page.

Note: Any time a change is made to an effective date of a hire action or creditable and non creditable service periods, you will have to again press the calculate SCD button for correct SCD date(s).

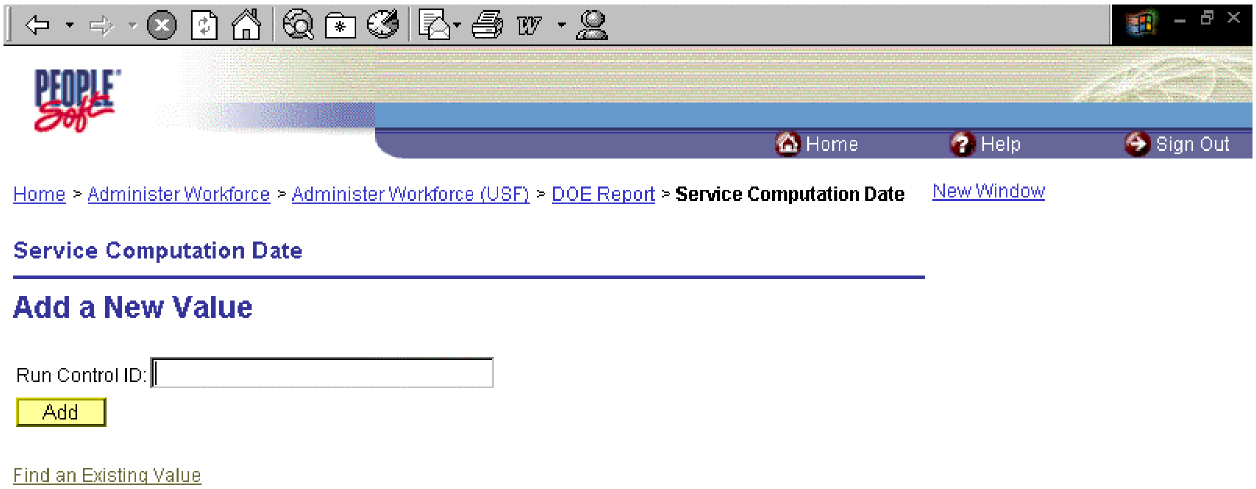
Now, you can enter the new calculated SCD date in the appropriate SCD field and save the record.



After saving a record in a PAR Status of PRO, you can print out the Service Computation Date report from the DOE Reports menu option for whichever SCD date you re-calculated.

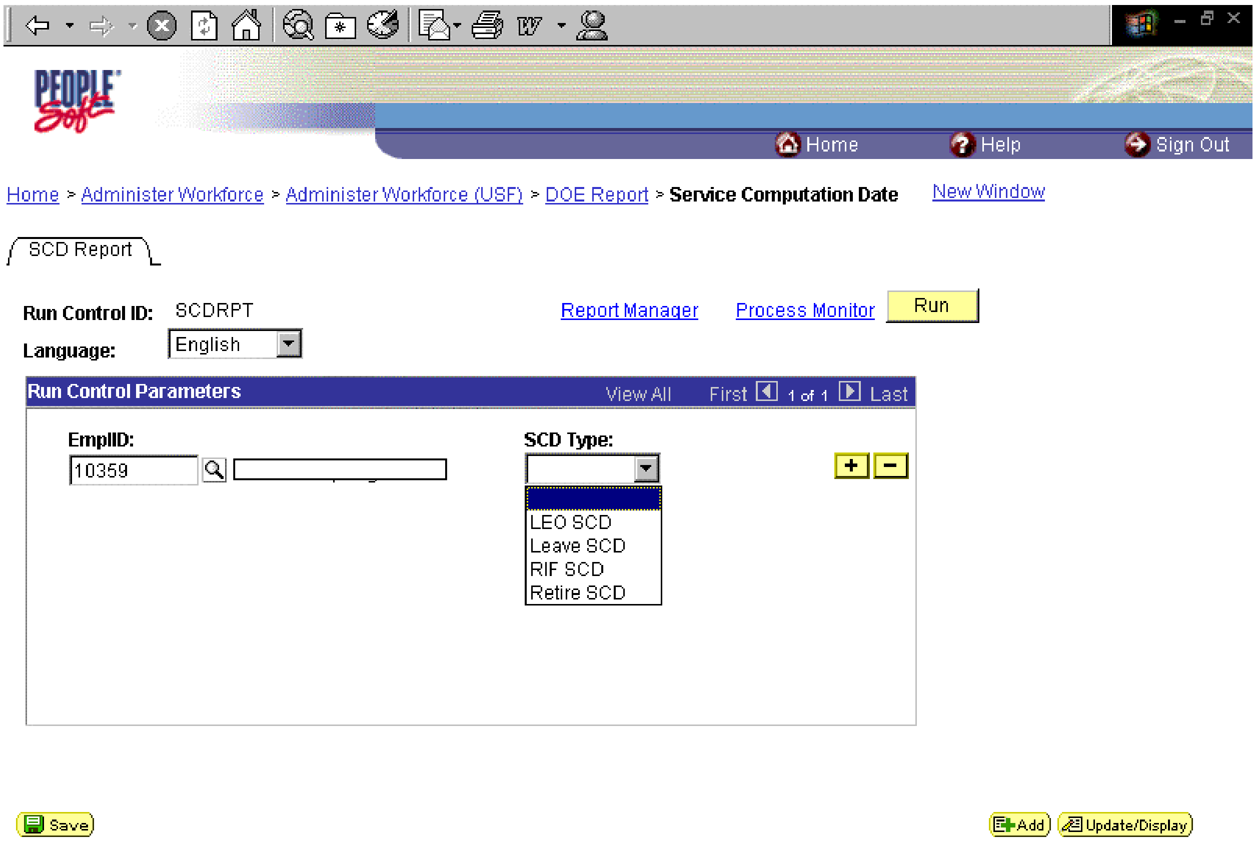


Administer Workforce > Administer Workforce (USF) > DOE Report > Service Computation Date



Enter a **Run Control ID**: “SCDRpt”, Click **Add**

(You will only have to add a Run Control the first time you generate an SCD report. Every time after you can use the run control you initially created " SCDRpt").

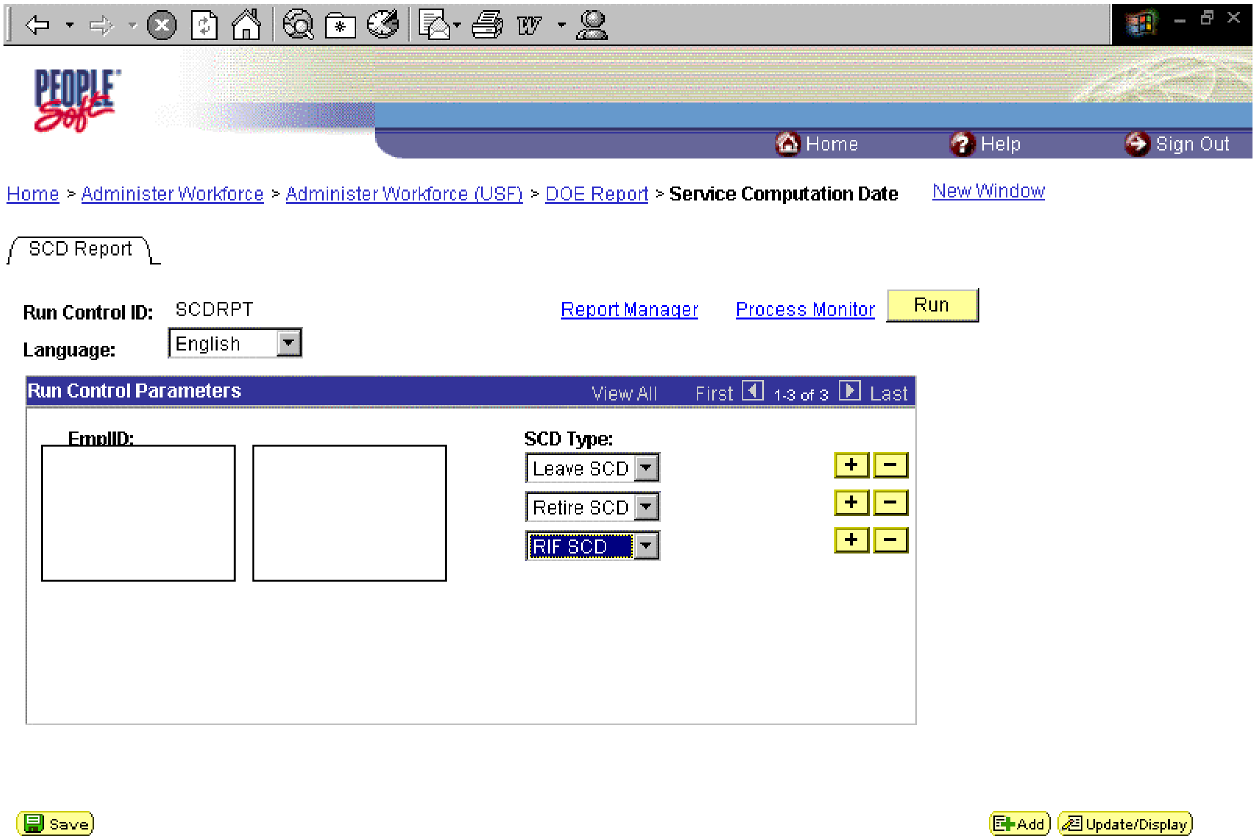


Enter the Emplid of the employee for whom you just calculated a new SCD.

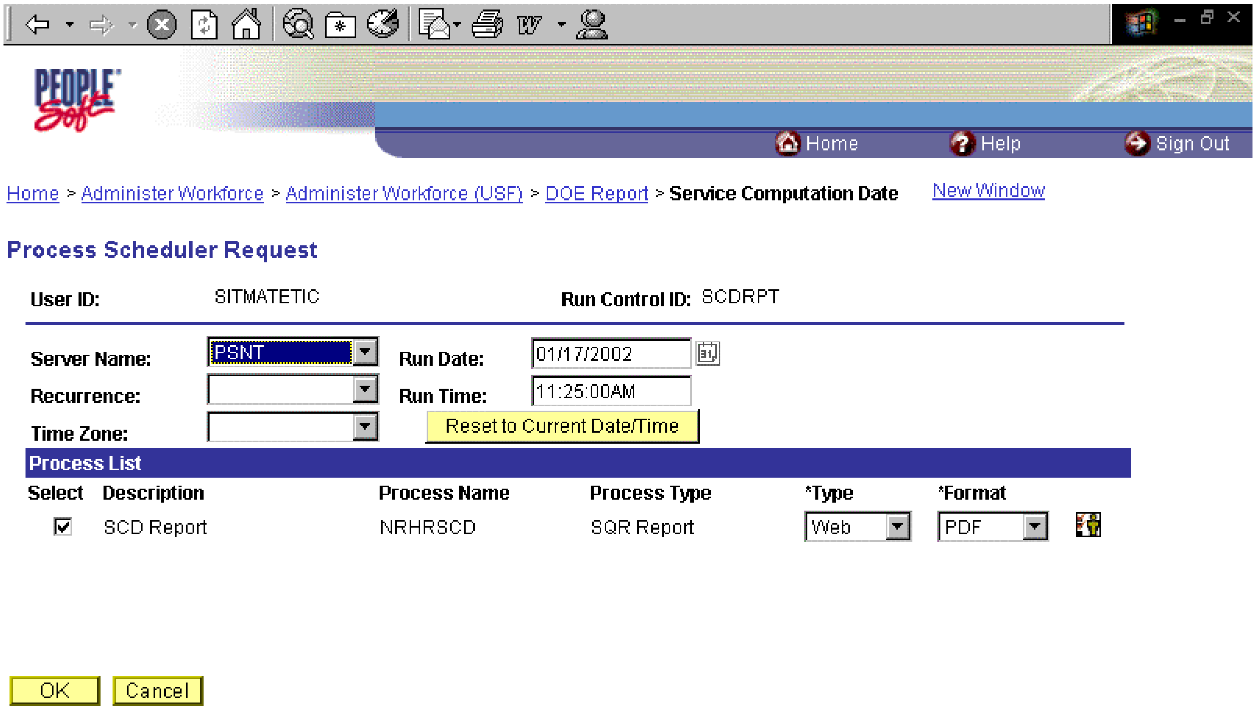
Select the SCD Type by using the down arrow to select the report you wish to generate.

Press (+) to insert a new row for each report you wish to generate.

You will receive a one page report for each SCD Type you select. **You cannot generate an SCD report for a future dated action.**



SAVE. Click on **RUN** to execute the report. NOTE: Remember that if you did not do a calculation for each of the selected SCD Types there will be no pertinent information on the report. You should only print reports for the SCD's you calculated on the Employment 1 page with a new SCD date.



Server Name: PSNT

Type: Web

Format: PDF

Follow the printing procedures in the section of this manual entitled “Printing from Adobe Acrobat 5.0”.

How to Make Inquiries

1. Choose **Inquire** from the menu and select either **Job Summary** or **Personal Data**. A lookup dialogue box will appear.
2. Select employee and click **OK**. The information you requested will appear.
3. When you are finished viewing the information, click the **Cancel** button on the toolbar.

How to Find a Job Code on a Position Data Record

1. Place the cursor on the **Job Code** field.
2. Click on the magnifying glass.
3. Type the **Salary Grade, Pay Plan, Occupational Series,** and **Official Position Title.** It is not necessary to type all of these variables. This process will narrow the search to find the correct Job Code.
4. Select the **Job Code** from the valid values list that corresponds to the variables of the position you are creating/modifying. Double click on the correct job code, and it will appear in the **Job Code** field.
5. If there is no **Job Code** where all 15 variables match, use the request form so that it can be added to the database and you can continue with the action. The request form can be found in the "*Position Information*" section.

How to Enter Names And Dates Correctly

Enter all names in upper and lower case format.

NOTE: The program is case sensitive and you must enter NMN (for no middle name) if the employee does not have a middle initial. This is a requirement based on OPM's Guide to Processing Personnel Actions, Chapter 3, subchapter 1-2.

CHRIS uses the following format for dates:

MM/DD/YYYY

The program automatically inserts slashes; you can enter most dates with two digits in the date field and the system will convert it a four digit year. **Example**, if you are entering April 4, 1961, you would type 04041961, not 4461. When entering **DOB** (Date of Birth), you must enter all four digits for the year.

Change of Address

Administer Workforce > Administer Workforce (USF) > Use > Address Changes

1. Select employee.
2. Make appropriate change. This will only change most recent action and carry forward for all future actions.
3. Save.

NOTE: The following warning will display if an incomplete address is entered: **"The address should consist of at least Address line #1 and the City, State, Country and Postal Code. Please verify the address before saving the record."** These five fields must be entered or this warning will be displayed. If entering FPO/APO addresses for overseas military delivery, FPO AP/AE or APO AE/AP should be entered in the "City" field and the "State" field remains blank. Although the blank "State" field causes the address warning to be displayed, the user should verify the rest of the address and save the record.

How to Enter Emergency Contact Information

Administer Workforce > Administer Workforce (USF) > Use2 > Emergency Contact

Contact Address/Phone

1. Select employee.
2. Enter **Contact Name**.
3. Enter **Relationship to Employee**.
4. Check **Primary Contact** box if applicable.
5. Check **Same Addr/Home Phone as EE** box, if applicable. Once box is checked address information will autopopulate for the employee's record.

Other Phone Numbers

1. Enter **Phone Type**. If more than one **Phone Type**, insert row (+).
2. Enter **Phone**.
3. Save.

Correcting Home Phone Numbers

To change a home phone number, open the employee's record under *Administer Workforce > Administer Workforce (USF) > Use >* Address Changes. Click on the "Personal Phone Numbers" button, click on the down arrow in the "Phone Type" field, and select "Home" from the pick list. Click in the "Telephone" field to make the necessary corrections, click "OK" to exit the page, and then save the correction. You may correct all of the personal phone numbers--cellular, fax, pager--listed under "Phone Type"; however, you cannot change the Business phone in CHRIS. The Business phone number can be changed by the employee in Employee Self Service or through the site's submission of a file to the CallUp/People program administered by Headquarters/Germantown.

How to Enter Remarks

Be sure to enter all necessary remarks. It is **IMPORTANT** that remarks appear on all NOA Code **“002”** and **“966”** actions.

On this page, you will enter the required remarks by typing the pertinent remark code in the field **Remark CD**. Press tab and the remark text will appear in the lines below.

- ⇨ If the remark appears with “********”, you must fill in the relevant information. Highlight the “********”, press delete and type in the appropriate information.

- ⇨ To find a specific **Remark CD**, click on the magnifying glass to narrow your search by typing the first three characters of the **Remark CD** or by typing the first word or a few words of the remark. A valid value list will appear from which you can select the remark.

- ⇨ If the action requires more than one remark click on (+) to add the next remark. Use the left < and right > arrows at the top right hand corner of the remark page to view the remarks.

- ⇨ There is no limit to the number of remarks you can enter.

Employees Subject to a Salary Cap

Adjusted Basis Pay has been redefined as the maximum adjusted rate of basic pay after taking into account all pay caps that may be applicable. This means that Adjusted Basic Pay (Blocks 12C and 20C) will reflect the capped salary if the employee’s basic pay plus locality adjustment would exceed the cap.

Locality Adjustment (Blocks 12B and 20B) will be derived by subtracting basic pay from the capped adjusted basic pay (Blocks 12C and 20C).

Total Salary (Blocks 12 and 20) will include the amount of adjusted basic pay plus any AUO, availability pay, retention allowance or supervisory differential after taking into account all pay caps that may be applicable.

For employees on Grade Retention, Total Salary (Blocks 12 and 20) will be shown in relation to the pay basis for the pay plan under which the employee is paid. Currently, SF-50 and CPDF instructions require that pay be shown in relation to the pay basis for the position the employee is occupying. For example, this change would impact employees with retained grade who are either occupying a GS position (pay basis: per annum) while being paid under a wage system (pay basis: per hour) or who are occupying a wage system position while being paid as a GS.

Processing Multiple Actions with Same Effective Date for an Employee

Administer Workforce > Administer Workforce (USF) > Use > Request Action

The system will automatically assign a **Sequence Number** if more than one action is processed with the same effective date. The **Sequence Number** field is found on the **Data Control** page. You must determine the order in which to process the actions so that the employee's record reflects them in the proper sequence.

When an employee is entitled to multiple pay benefits simultaneously, the actions must be processed in the order that gives the employee the maximum benefit. For example, when a promotion and within grade increase are effective the same day, check the **WGI Due Dt** before inserting a row to process a promotion action. If the **WGI Due Dt** is the same date as the promotion, process the promotion after the automatic WGI process runs then establish a new position before processing the promotion. If the WGI is not processed during the automatic process, it must be entered manually.

- ⇨ Establish a new position (using another existing job code or request a new job code) for use in processing the second action;

or

- ⇨ Determine if there is an existing position which is different from that to which the employee was assigned in the first action which can be used in processing the second action.

(Remember to inactivate the old position by inserting a new row on the position data record with an effective date one day after the effective date of the promotion.)

Entering an Action that Follows a Cancellation

The system will not allow a row insert if a NOA Code “001” Cancellation action is the top row of a record. You must insert the row below the cancellation. After the necessary action is then processed, cancel out of the record. Again retrieve the record, and notice that the system resorted the action in the appropriate effective date order.

How to Process Intervening Actions

An intervening action is a personnel action which has an effective date earlier than the effective date of the most recent personnel action already processed for a given employee. When entering an intervening action, which involves any change to the position, employment, or job information, the changes effected by the intervening action ***DO NOT*** automatically update the subsequent actions that are resident in CHRIS. To enter an intervening action you must use the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

While use of the correction menu when processing a NOA Code “002” Correction action prompts you to review subsequent actions to determine if additional corrections are needed, ***there is no prompt*** when you insert a row to process an intervening action.

Once the intervening action has been processed, you must remember to review all subsequent actions and, if necessary, process either a NOA Code “002” or “966” correction action, as appropriate, on each action with an effective date greater than the effective date of the intervening action.

> **For example:** If you failed to process a within-grade increase for an employee that was due a month ago, and a reassignment has already been processed for the current pay period, the WGI action must be processed as an intervening action. Once the WGI is entered in CHRIS, the employee’s step and salary on the reassignment action must be updated via a NOA Code “002” Correction.

If an intervening action is processed and one or more NOA Code 9XX and/or award actions were subsequently processed, you must contact the CHRIS Functional Hotline and request that the subsequent actions be refreshed. This refresh must be done so that the subsequent actions reflect the changes that were made to the record as a result of the intervening action. This refresh must be done the same day the intervening action is changed from an REQ to a PRO PAR Status.

Understanding the Reviewed Flag

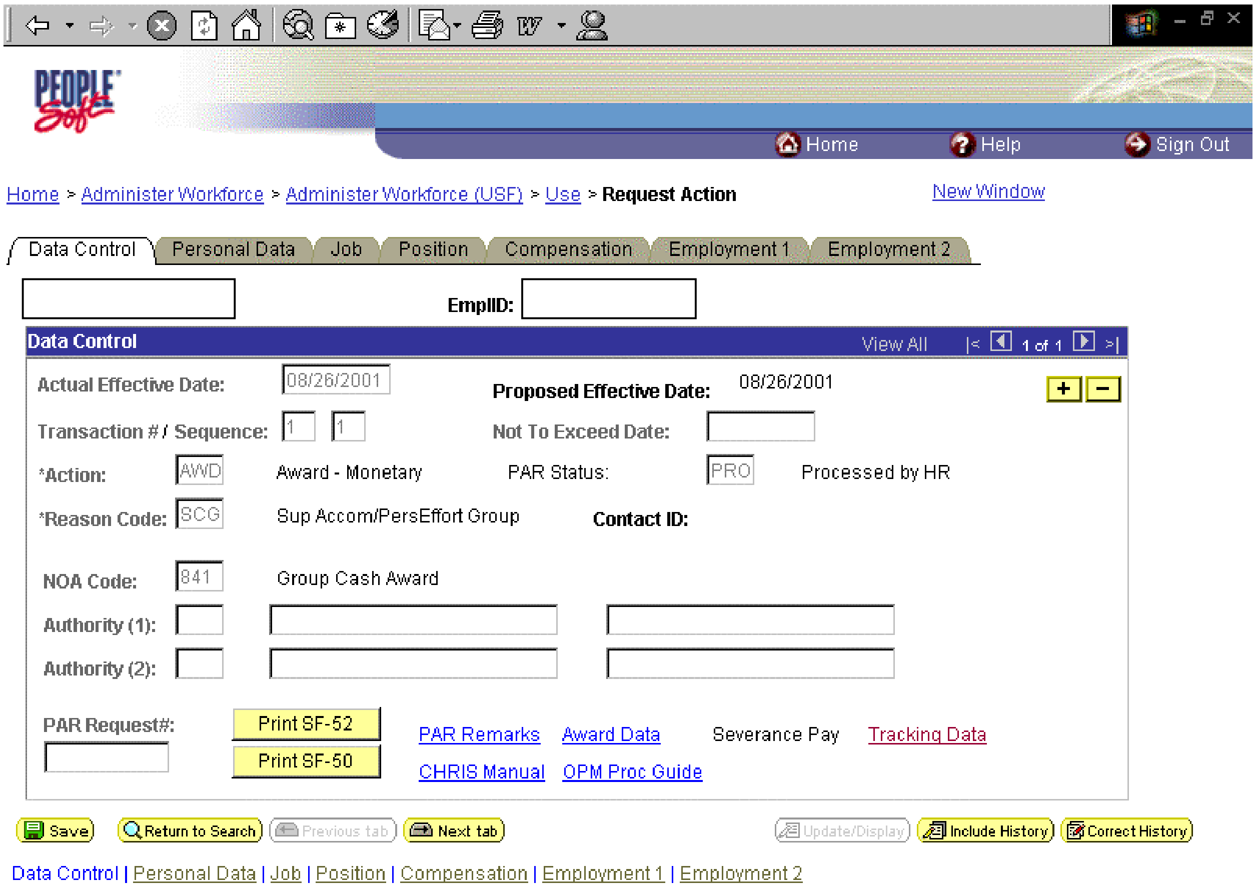
When processing a NOA Code “002” Correction on an action with an effective date earlier than the most recent action, the following message will appear upon saving the action: “You must review records effected by changes and check the Review Performed Flag before saving.”

Before the system allows you to save the action, it requires you to scroll to review subsequent actions and place a check in the **Reviewed** check box in the upper right hand corner of each subsequent action before you can save the NOA Code “002” Correction action.

By checking the **Reviewed** checkbox on each row, it does ***not*** give you the opportunity to make changes to those actions, ***nor*** does it automatically correct the field(s) that were changed by the NOA Code “002” Correction action.

> The purpose of the **Reviewed** checkbox is to give you the opportunity to review each subsequent action and make a determination as to whether or not the field(s) changed on the NOA Code “002” Correction action also need to be corrected on all subsequent rows as well.

How to Access the CHRIS Users' Manual and OPM Guide to Processing Personnel Actions Within an Employee Record



CHRIS Manual Link: This can be used to access the web version of the CHRIS Users' Manual for quick reference while processing an action. When you click on this link, you will automatically connect to the HR/TR Users section of the CHRIS homepage.

OPM Proc Guide Link: This can be used to access OPM's electronic version of the Guide to Processing Personnel Actions for quick reference while processing an action.

How to Enter/Update Education Information

You may store multiple rows of education data in CHRIS. Enter additional rows by inserting a new row (+). It is not necessary to insert education information by effective date or degree order. When the action is saved, the system will resort the education information from lowest to highest education level. To view the updated information in the proper sort order, you must exit the record (Click on **Use** and re-enter the emplid to view the record with the revised education information.

CHRIS will not allow duplicate education records for the same education level and year. **For example**, if an employee has completed a bachelor's degree with a dual major in the same year, you will be able to enter only one major. Ask the employee to select which major to enter in CHRIS.

A matrix for determining how to complete education information follows this procedure. A table defining education levels can be found in the section labeled "*CHRIS Codes/Terms*".

Administer Workforce > Administer Workforce (USF) > Use > Education

1. Locate appropriate employee.
2. Enter **Education Level**.
3. If education level is ***06, 10, 13 or higher***, complete the following:
    a) Enter **Credit Hours** attained (optional).
    b) Enter **GPA** (optional).
    c) Enter **Credit Hrs Type**. (This field must be completed if **Credit Hours** is completed.)
    d) Enter the **Instructional Program Code**. (The magnifying glass can be used to search by Description). (**Descr** will automatically populate based on the **Instructional Program Code** selected)
    e) Enter the **School Code** (Click on the magnifying glass to search by State). If you do not find the school you need, contact the CHRIS Functional Hotline via email with the school name and location (city, state). You will be notified via email when the **School Code** has been added to the database. (Only Schools above high school level - technical, business, colleges and universities - will be added to the school table) Education information can be saved without School Name, but remember to enter this information after the School Code is assigned. **School**, **State**, and **Country** will autopopulate based on selection of the **School Code**.
4. **Insert** a Row (+) to add additional education levels if necessary.
5. Click on the **Save** icon.

Education Level *	**Instructional Program**	**Year Degree or Certificate Attained**
01 - No formal education or some elementary school	Must be blank	Must be blank
02 - Elementary school completed--no high school	Must be blank	Must be blank
03 - Some high school--did not graduate	Must be blank	Must be blank
04 - High school graduate or certificate of equivalency	Must be blank	Must be blank
05 - Terminal occupational program--did not complete	Must be blank	Must be blank
06 - Terminal occupational program--certificate of completion, diploma or equivalent.	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2
07 - Some college--less than year one	Must be blank	Must be blank
08 - One year college	Must be blank	Must be blank
09 - Two years college	Must be blank	Must be blank
10 - Associate Degree	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2	Must be completed if employee entered on duty after 9/30/93, and tenure is 1 or 2
11 - Three year college	Must be blank	Must be blank
12 - Four years college - no baccalaureate	Must be blank	Must be blank
13 - Bachelor's degree	Must be completed	Must be completed
14 - Post-Bachelor's	Must be completed	Must be completed
15 - First professional	Must be completed	Must be completed
16 - Post-first professional	Must be completed	Must be completed
17 - Master's degree	Must be completed	Must be completed
18 - Post-Master's	Must be completed	Must be completed
19 - Sixth-year degree	Must be completed	Must be completed
20 - Post-sixth year	Must be completed	Must be completed
21 - Doctorate degree	Must be completed	Must be completed
22 - Post-Doctorate	Must be completed	Must be completed

* Must be completed for all employees

How to Enter/Update Employee Review (Performance Rating) Information

Employee review information must be entered in CHRIS in the following situations:

1. **Hire Actions**: When any type of hire action is entered in CHRIS, a performance rating record must be entered with the **same** effective date as the Hire action. Hire actions include all NOA Code 1XX actions, as well as some 5XX and those 7XX actions which add a new employee to CHRIS, such as internal hires from FERC and BPA. The Review Date automatically defaults to the effective date of the hire; however this date will not display on the initial employee review page. The rating level must be "X" or "Z" for the initial row inserted with a hire action.
2. **Upon receipt of the performance file from a previous Federal agency or the Federal Records Center:** When new employees are appointed to DOE by transfer or reinstatement, official ratings of record issued by the prior Federal agency/agencies must be entered in CHRIS if they were issued within the 4-year period immediately prior to the DOE appointment. Since this information is not available at the time the employee comes on board, performance rating history records must be entered upon receipt from the former agency.
3. **Employee Receives Official Rating of Record:** An employee's official rating of record must be entered in CHRIS. PERFORMANCE RATINGS, OTHER THAN OFFICIAL RATING OF RECORD, WILL NOT BE ENTERED IN CHRIS. Rating of record means the performance rating prepared at the end of an appraisal period for performance of agency-assigned duties over the entire period and the assignment of a summary level within a pattern as defined in the attached table. For an employee not subject to 5 U.S.C. Chapter 43 or 5 CFR Part 430, it means the officially designated performance rating, as provided for in the agency's appraisal system, that is considered to be an equivalent rating of record. For additional information refer to 5 CFR 351--Reduction in Force, 5 CFR Part 430--Performance Management, and 5 CFR Part 531--Pay Under the General Schedule. If an employee is not rated during any particular performance cycle, the employee review information should be updated in the system to indicate that the employee was not rated.
4. **Employee is Converted to an SES Position From Any Non-SES Pay Plan:** When an employee is converted to an SES position from any non-SES pay plan, a new performance rating row effective on the date of the conversion action must be inserted to indicate that the employee has not yet been rated under the SES performance requirements. This new performance rating row should be entered when the PAR Status on the conversion transaction is changed to "PRO".
5. **Employee Moves From a Covered to an Excluded Position:** When an employee moves from a covered to an excluded position (e.g., from ES to EX), a new performance rating row effective on the date of the conversion action should be inserted to indicate that the employee is excluded from coverage. In DOE, employees in Pay Plans GS, GM, ES, WG, WL, WS, WB, AD, SL, ST, EJ, and EK will be covered by a performance management system. Employees in Pay Plans EX*, ED, EF, EI, AL, CA and ZZ will be excluded from coverage.

   *EX employee with a pay rate determinant of “S” are covered by the SES Performance Management Plan if they elect to retain eligibility for SES performance appraisals and awards. Otherwise, they are excluded from coverage. **Examples:**

   An ES employee is converted to EX position:

   Create new performance management row
   Review Date=Conversion Date
   Rating Pattern=H
   Rating=Z (Excluded)

   An ES employee with a pay rate determinant of “S” is converted to an EX position and declines coverage for ES performance appraisals and awards:

Create new performance management row
Review Date=Conversion Date
Rating Pattern=H
Rating=Z (Excluded)

An ES employee with a pay rate determinant of "S" is converted to an EX position and retains eligibility for ES performance appraisals and awards:

No action is necessary since employee should already be on cycle to receive next official rating of record .

6. **Employee moves from an Excluded to a Covered Position:** When an employee moves from an excluded to a covered position, a new performance rating row effective on the date of the conversion action should be inserted to indicate that the employee is now in a covered position but has not yet been rated and to record the appropriate rating pattern/scale. See paragraph 4 above for a list of covered and excluded pay plans. **Examples:**

   An EX employee is converted an ES position

   Create new performance management row
   Review Date=Conversion Date
   Rating Pattern=F
   Rating=X (Not rated)

   An Expert (ED) or Consultant (EF) is converted to a GS position

   Create new performance management row
   Review Date=Conversion Date
   Rating Pattern=A, B, C, D, E, F, G or H
   Rating=X (Not rated)

   An Expert (ED) or Consultant (EF) is converted to an ES position

   Create a new performance row
   Review Date=Conversion Date
   Rating Pattern=F
   Ratings=X (Not rated)

A matrix for determining how to complete review information follows this procedure. A table defining rating patterns/scales can be found in the section labeled "*CHRIS Codes/Terms*".

Administer Workforce > Administer Workforce (USF) > Use > Employee Review

1. Select employee.
2. A new row must be inserted (+) for each official rating.
3. Enter **Review Date**. This is the date the supervisor communicated the rating to the employee and is considered the rating effective date.
4. Enter **Rating Pattern**. You must determine the appropriate rating pattern that your sub-agency uses. Some may be different for SES, Supervisory, and/or Non-supervisory employees and should be changed for employees who have recently been reassigned to a difference rating pattern, i.e., GS to ES.
5. Enter **Rating Level** or select from drop-down list.
6. Check **Issued by non-DOE agency** box if applicable.
7. Enter **Review From Date**. This is the date that marks the beginning of the rating period.
8. Enter **To Date**. This is the date that marks the end of the rating period.
9. **Next Review Date**. Leave blank – DO NOT POPULATE.
10. **Date Validated** is used for review of employee ratings in preparation for reduction-in-force and should not be populated until an actual review is being performed.
11. **Save**.

Category	Review Date	Rating Pattern	Rating Level	Review From Date	Review To Date	Next Review Date	Date Validated
Hire Actions for Pay Plans GS, GM, WG, WL, WS, WB, AD, SL, ST, EX*, EJ and EK	Date of Hire	A, B, C, D, E, F, G or H	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Hire Actions for Pay Plans EX, EX*, ED, EF, EI, AL, CA and ZZ	Date of Hire	H	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Hire Actions for Pay Plan ES	Date of Hire	F	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion to ES from any non-ES pay plan	Date of Conversion	F	X	Leave Blank or Delete	Leave Blank or Delete	Leave Blank	Leave Blank
Hire Actions for Pay Plans EX*, ED, EF, EI, AL, CA and ZZ	Date of Hire	H	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion from a covered to an excluded position (e.g., ES to EX; ES to EX*)	Date of Conv. Action	H	Z	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Conversion from an excluded to a covered position (e.g., EF to ES;)	Date of Conv. Action	A, B, C, D, E, F, G or H	X	Leave Blank	Leave Blank	Leave Blank	Leave Blank
Ratings issued by DOE prior to 10/1/97	Eff. Date of Rating**	DOE	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
ˇ Ratings issued by DOE after 9/30/97	Eff. Date of Rating**	A, B, C, D, E, F, G or H	1, 2, 3, 4, 5 or X***	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
Ratings issued by Federal agency other than DOE prior to 10/1/97****	Eff. Date of Rating**	OFA	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank
Ratings issued by Federal agency other than DOE after 9/30/97****	Eff. Date of Rating**	A, B, C, D, E, F, G or H	1, 2, 3, 4 or 5	Date rating period began	Date rating period ended	Leave Blank	Leave Blank

* In DOE, employees in Pay Plans GS, GM, ES, WG, WL, WS, WB, AD, SL, ST, EJ, EK and EX (pay rate determinant of “S”) will be covered by a performance management system. Employees in Pay Plans EX, ED, EF, EI, AL, CA and ZZ will be excluded from coverage. EX employees with a pay rate determinant of “S” are covered by the SES Performance Management Plan if they elect to retain eligibility for SES performance appraisals and awards. Otherwise, they are excluded from coverage.

****** Eff. Date of Rating is the date the rating is communicated to the employee which should also be the date the supervisor signed the official rating of record.

******* If an employee is not rated during a particular rating cycle, a review record must be established. The review date would be established as the end date for the rating cycle, the appropriate pattern for the employee must be entered, and an X (not rated) should be entered for the rating.

******** For ratings issued by a Federal agency other than DOE, check the box labeled “Issued by non-DOE agency”. This check box has been added to the Employee Review page as of 2/7/99.

How to Manually Correct/Update "Reports to Position" and "Supervisor ID"

The following procedure should be used to complete manual updates:

Print the following reports: *Department Managers Report, "Reports to" Report and Reports to" Difference Report* using the instructions in the section of the manual entitled "CHRIS Reporting.

1. Determine whether corrections are needed in the Position Data record.

   -- Remember that the "Reports to Position" number is stored in employee’s Position Data record and also in personnel transactions. This information may need to be corrected in the Position Data record, in personnel transactions, or in both records. It is important to first correct the information in the Position Data record.

   -- In some situations, you will be able to make the correction on the employee’s current Position Data row while, in other situations, you will need to insert a new Position Data row to update "Reports to Position" number. For example, if you had a recent supervisory change within an organization, you will need to insert a new Position Data row for **each** employee assigned to that supervisor.

   -- On the employee’s new Position Data row, use an effective date that is equal to or greater than the effective date of the supervisor’s assignment to his/her new position.

   -- If you attempt to enter a "Reports to Position" Position and you receive a system message that the Position is not valid, this usually means one of two things. Either the "Reports to Position" number has been keyed incorrectly, or it was not a valid position as of the effective date of the Position Data record that you are adding or updating.

2. Once appropriate corrections/updates have been made to the Position Data record, process an NOA Code 966-Change in Non-SF-50 data to correct/update the "Reports to Position" and the "Supervisor's ID" on Employee Data 2 page if that information is incorrect.

   -- Simply insert your new transaction, complete the information on the Data Control page, and refresh the Position. (Any time the Position is refreshed you will need to re-enter the employee's step). The "Reports to Position" number, Title, "Supervisor's ID" and Name should now contain current information on the Employment 2 page. If the "Supervisor's ID" and name are missing, this means that a supervisor was not assigned to the "Reports to Position" number you entered on the Position Data record on the effective date of the NOA Code 966 action.

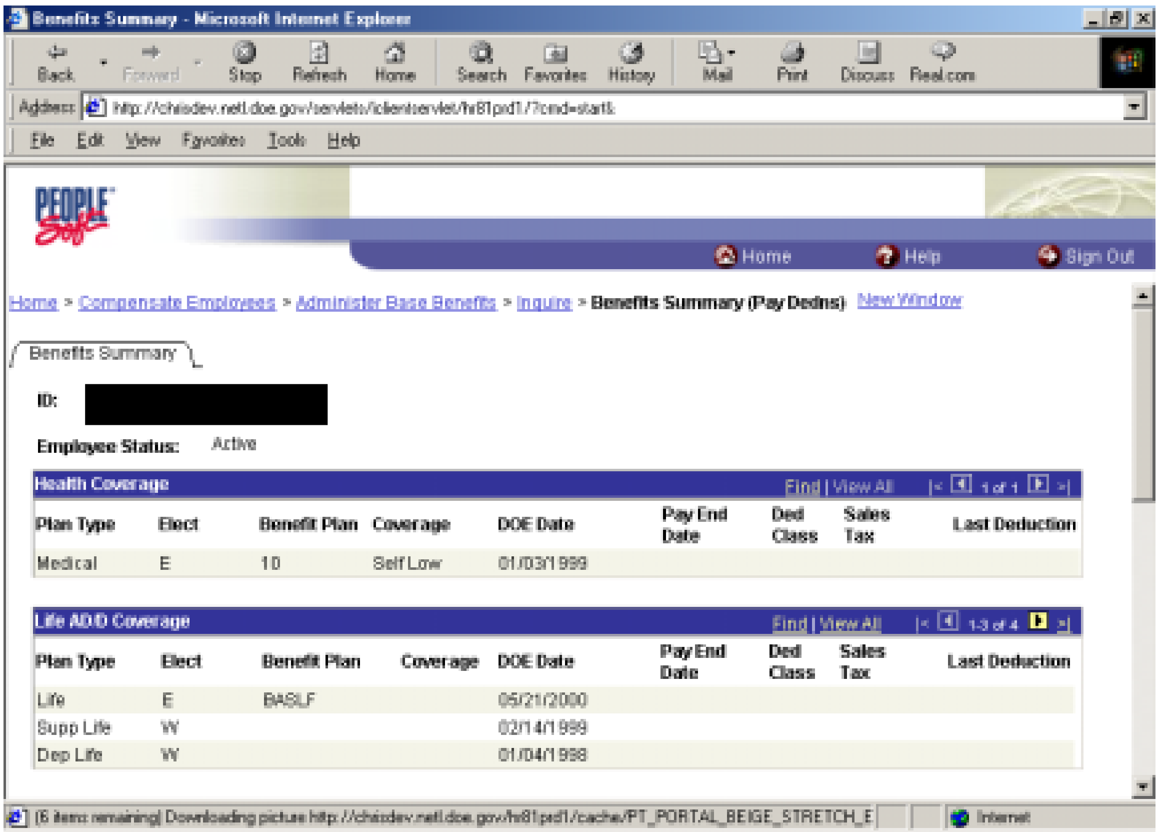
   Always use a current date for the NOA Code 966; retroactive changes could require that you process corrections to actions with a more recent effective date.

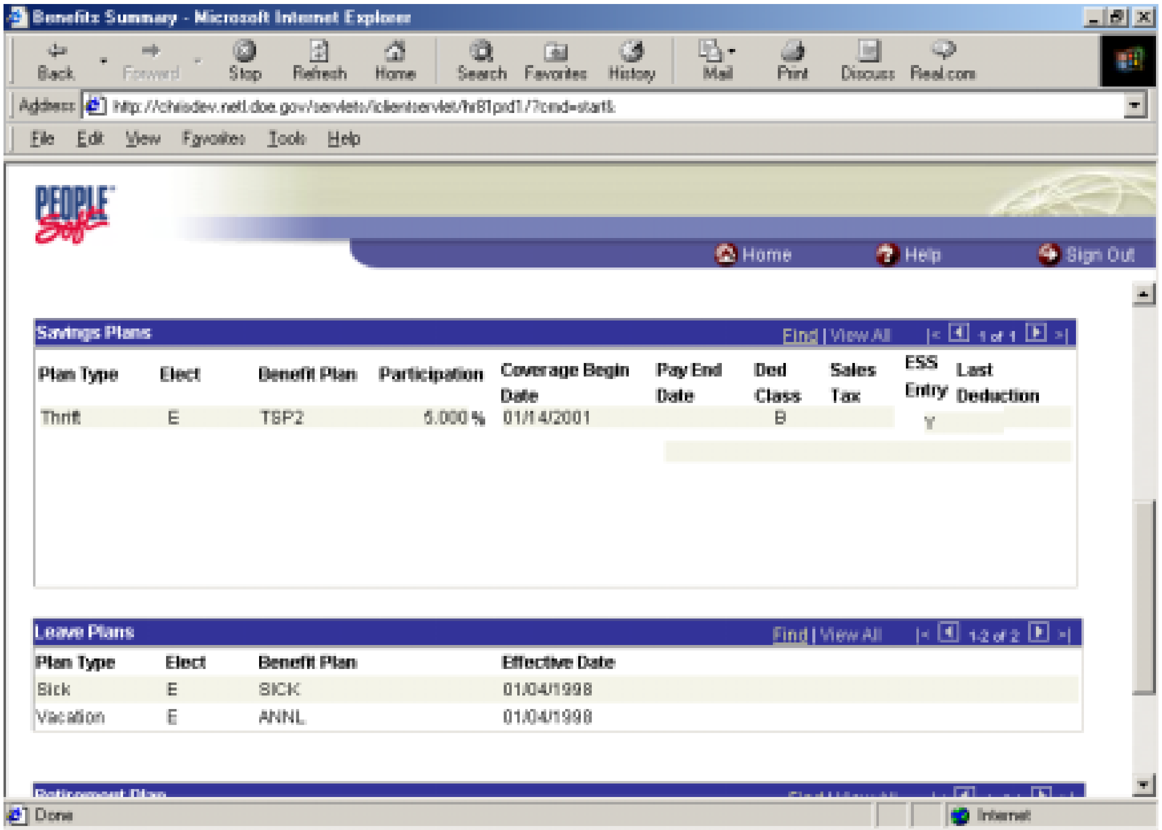
3. Mass processing capabilities exist for updating this information, refer to the section in this manual entitled *Mass Processing.*

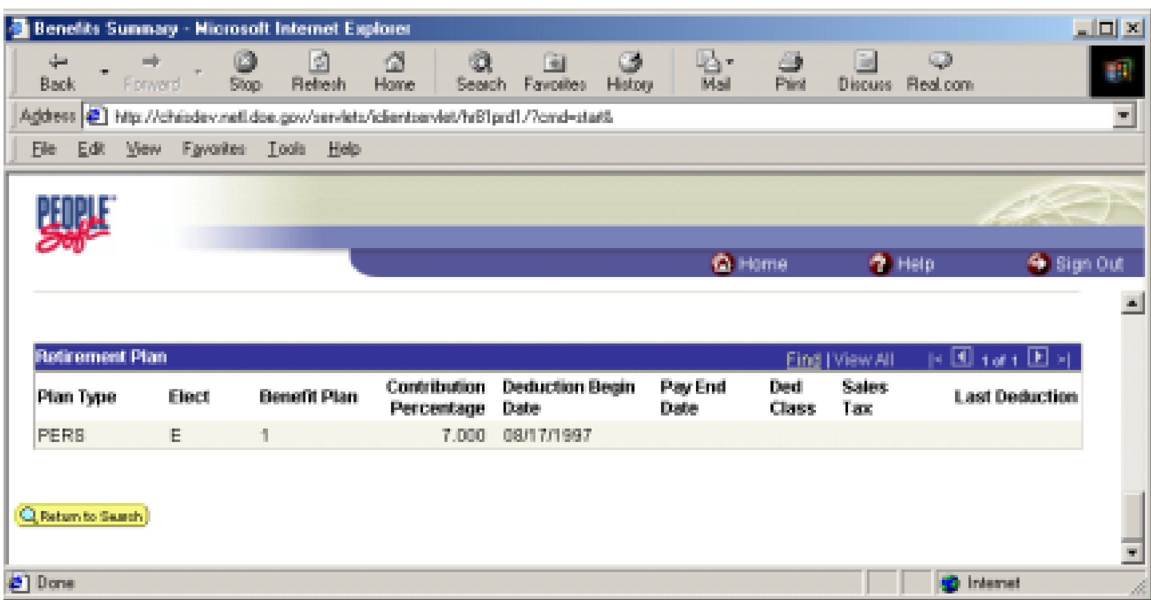
Benefits Inquiry Options

Compensate Employees > Administer Base Benefits > Inquire/Benefits Summary (Pay Dedns)

This page will display health benefits information for an employee to which you have access (also known as FEHB-Federal Employee Health Benefits).




Benefits Summary - Microsoft Internet Explorer
Back
Forward
Stop
Refresh
Home
Search
Favorites
History
Mail
Print
Discuss
Real.com
Address
http://chrisdev.netl.doe.gov/servlets/iclientservlet/hr81prd1/?cmd=start&
File
Edit
View
Favorites
Tools
Help
Home
Help
Sign Out
Savings Plans
Find | View All
1 of 1
Plan Type
Elect
Benefit Plan
Participation
Coverage Begin Date
Pay End Date
Ded Class
Sales Tax
ESS Entry
Last Deduction
Thrift
E
TSP2
5.000 %
01/14/2001
B
Y
Leave Plans
Find | View All
1-2 of 2
Plan Type
Elect
Benefit Plan
Effective Date
Sick
E
SICK
01/04/1998
Vacation
E
ANNL
01/04/1998
Done
Internet


Benefits Summary - Microsoft Internet Explorer
Back
Forward
Stop
Refresh
Home
Search
Favorites
History
Mail
Print
Discuss
Real.com
Address
http://chrisdev.netl.doe.gov/servlets/iclientservlet/hr81prd1/?cmd=start&
File
Edit
View
Favorites
Tools
Help
Home
Help
Sign Out
Retirement Plan
Find | View All
1 of 1
Plan Type
Elect
Benefit Plan
Contribution Percentage
Deduction Begin Date
Pay End Date
Ded Class
Sales Tax
Last Deduction
PERS
E
1
7.000
08/17/1997
Return to Search
Done
Internet

On the above page, **Benefits Summary**, you can view the Health Benefits information for an employee.

<u>Health Benefits Section:</u>

Plan Type -- Health Coverage

Type of Coverage -- E-Elect; W-Waive or T-Terminate

Plan Type -- for all Health Benefits this will be "10"

Coverage an employee elected: Self – High
Self – Low
Self+Family-High
Self+Family-Low
Self – Std
Waived/Canceled
Ineligible for Health Benefits

DOE Date -- which can be several different dates. It can be the date DOE converted to CHRIS as the system of record. It is not necessarily the effective date of the employees benefits election unless the employee is a new hire since conversion January 4, 1998 or if the employee made a change in election since that same conversion date. That is why this field is called the DOE Date and not "Effective Date" because it could be one of those scenarios; or it could be a date when the employee had a "life event" action as in a marriage or birth of a child.

End Date -- Date employee terminated coverage

The rest of the fields are not populated, as we do not use the PeopleSoft Payroll product.

<u>Life AD/D Coverage:</u>

Type of Life Insurance: (see page shots below for valid values)

Lookup FEGLI Code

FEGLI Code:

Basic Lookup

Search Results

View All First 1-74 of 74 Last

FEGLI Code	Description
90	Basic + Option B (3x)
A0	Ineligible
B0	Waived
C0	Basic Only
D0	Basic + Option A
E1	Basic + Option C (1x)
E2	Basic + Option C (2x)
E3	Basic + Option C (3x)
E4	Basic + Option C (4x)
E5	Basic + Option C (5x)
F1	Basic + Option A + Option C (1x)
F2	Basic + Option A + Option C (2x)
F3	Basic + Option A + Option C (3x)
F4	Basic + Option A + Option C (4x)
F5	Basic + Option A + Option C (5x)
G0	Basic + Option B (1x)
H0	Basic + Option B (1x) + Option A
I1	Basic + Option B (1x) + Option C (1x)
I2	Basic +Option B (1x) + Option C (2x)
I3	Basic + Option B (1x) + Option C (3x)
I4	Basic + Option B (1x) + Option C (4x)
I5	Basic + Option B (1x) + Option C (5x)
J1	Basic + Option B (1x) + Option A + Option C (1x)
J2	Basic + Option B (1x) + Option A + Option C (2x)
J3	Basic + Option B (1x) + Option A + Option C (3x)
J4	Basic + Option B (1x) + Option A + Option C (4x)
J5	Basic + Option B (1x) + Option A + Option C (5x)
K0	Basic + Option B (2x)
L0	Basic + Option B (2x) + Option A
M1	Basic + Option B (2x) + Option C (1x)
M2	Basic + Option B (2x) + Option C (2x)
M3	Basic + Option B (2x) + Option C (3x)
M4	Basic + Option B (2x) + Option C (3x)
M5	Basic + Option B (2x) + Option C (5x)
N1	Basic + Option B (2x) + Option A + Option C (1x)
N2	Basic + Option B (2x) + Option A + Option C (2x)
N3	Basic + Option B (2x) + Option A + Option C (3x)
N4	Basic + Option B (2x) + Option A + Option C (4x)
N5	Basic + Option B (2x) + Option A + Option C (5x)

P0	Basic + Option B (3x) + Option A
Q1	Basic + Option B (3x) + Option C (1x)
Q2	Basic + Option B (3x) + Option C (2x)
Q3	Basic + Option B (3x) + Option C (3x)
Q4	Basic + Option B (3x) + Option C (4x)
Q5	Basic + Option B (3x) + Option C (5x)
R1	Basic + Option B (3x) + Option A + Option C (1x)
R2	Basic + Option B (3x) + Option A + Option C (2x)
R3	Basic + Option B (3x) + Option A + Option C (3x)
R4	Basic + Option B (3x) + Option A + Option C (4x)
R5	Basic + Option B (3x) + Option A + Option C (5x)
S0	Basic + Option B (4x)
T0	Basic + Option B (4x) + Option A
U1	Basic + Option B (4x) + Option C (1x)
U2	Basic + Option B (4x) + Option C (2x)
U3	Basic + Option B (4x) + Option C (3x)
U4	Basic + Option B (4x) + Option C (4x)
U5	Basic + Option B (4x) + Option C (5x)
V1	Basic + Option B (4x) + Option A + Option C (1x)
V2	Basic + Option B (4x) + Option A + Option C (2x)
V3	Basic + Option B (4x) + Option A + Option C (3x)
V4	Basic + Option B (4x) + Option A + Option C (4x)
V5	Basic + Option B (4x) + Option A + Option C (5x)
W0	Basic + Option B (5x)
X0	Basic + Option B (5x) + Option A
Y1	Basic + Option B (5x) + Option C (1x)
Y2	Basic + Option B (5x) + Option C (2x)
Y3	Basic + Option B (5x) + Option C (3x)
Y4	Basic + Option B (5x) + Option C (4x)
Y5	Basic + Option B (5x) + Option C (5x)
Z1	Basic + Option B (5x) + Option A + Option C (1x)
Z2	Basic + Option B (5x) + Option A + Option C (2x)
Z3	Basic + Option B (5x) + Option A + Option C (3x)
Z4	Basic + Option B (5x) + Option A + Option C (4x)
Z5	Basic + Option B (5x) + Option A + Option C (5x)

Coverage: E-Elect, W-Waive, T-Terminate

FEGLI (Life Insurance) Plan: BASLF – Basic Life
BLF1 – Option B Additional (1x base)
BLF2 – Option B Additional (2x base)
BLF3 – Option B Additional (3x base)
BLF4 – Option B Additional (4x base)
BLF5 – Option B Additional (5x base)
OPCLF – Option C Family (1x base)
OPCLF2 – Option C Family (2x base)
OPCLF3 – Option C Family (3x base)
OPCLF4 – Option C Family (4x base)
OPCLF5 – Option C Family (5x base)
LBEN – FEGLI Living Benefits
OPLAF – Option A Standard ($10,000)

DOE Date: which meets the same criteria as the one for Health Benefits above as to what this date could be.

TSP Information:

Plan -- TSP

Election info: E – Elect, W – Waive, T – Terminate

Plan Type: TSP1 – TSP EMPLOYER MATCH-FERS
TSP2 – TSP NO MATCH-CSRS

$ or % B/A Tax -- Dollar or Percent of contribution

ESS Entry -- this checkbox will be checked (or "on") only if the employee entered the information through the ESS system—otherwise it will not be checked.

Begin Date: With the recent open enrollment period, this date should reflect the effective date of the most recent election or change made by the employee.

End Date: Would equal the date the employee terminated their TSP election.

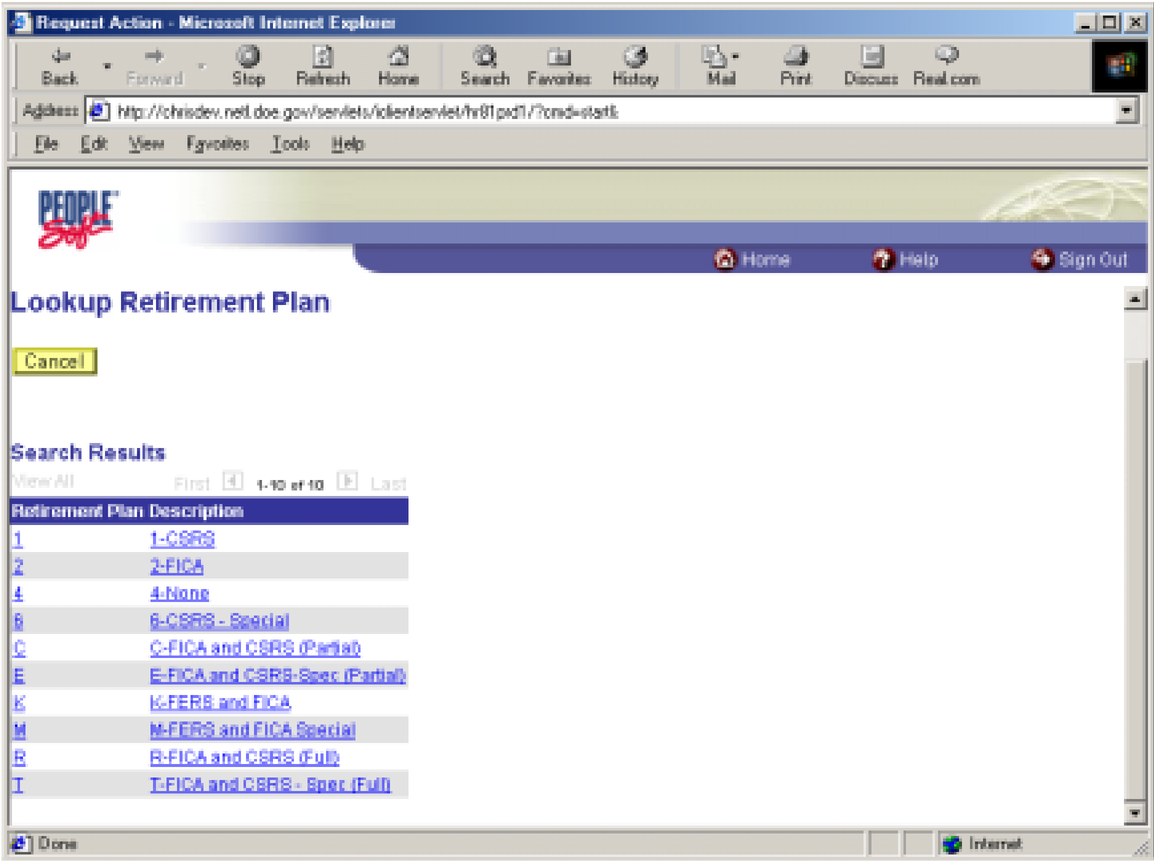
And the last columns on this line would indicate only if it were a Before Tax (B) deduction or and After Tax (A) deduction.

The last fields that you will see are for the Retirement Plan information.

Plan Type -- Retire

Election info: E – Elect, W – Waive, T – Terminate

Retirement Code:



Retirement Plan Percent info -- This is a percent calculation based on the Retirement Plan and Retirement Type entered for the employee based on the type of employee this is for (FERS or CSRS) and the retirement code listed above. (Please check with your benefits administration team if you have questions about this field.)

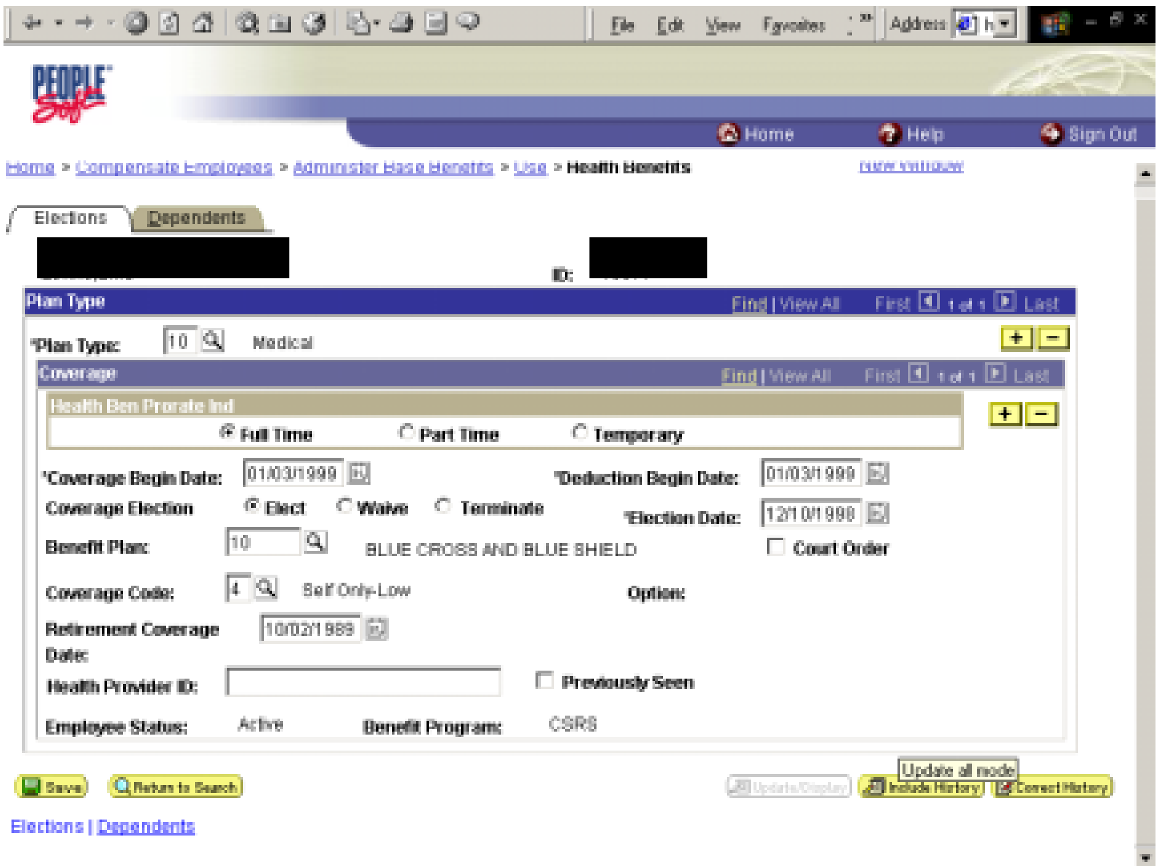
Begin Date: Shows DOE date information.

Health Benefits Page:

This page has a checkbox to indicate if there is a Court Order for an employee regarding benefits or not.

Compensate Employees > Administer Base Benefits > Use > FEHB/Elections

Access will be Display Only.



If the checkbox is "on" or checked, it indicates that the Payroll/Benefits department has received a court order for this employee; if there is no check, then no court order has been received by the Payroll/Benefits department.

4 Hire Actions

Contents

4.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Hire Actions

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 170 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
HIR	Hire	ADM – Administrative Accession BRO - Brought into Competitive Service CMP – Competitive Appointment DEM - Change to Lower Grade ECA - Expert/Consultant Appointment EMG – Emergency Appointment EXC – Excepted Service Appointment EXO - Executive Order Appointment FNA - Foreign National Appointment IPA – Intergovernmental Personnel Act LAT – Lateral MIL – Military NPS - New Position OVS – Overseas Limited Appointment PAN – Provisional Appointment NTE PRO – Promotion RES – Reinstatement Appointment RRR – Restoration/Reemployment Right SCH – Schedule A, B, C, Appointment SES - Senior Executive Service Appt STQ – Appointment Status Quo TMP – Temporary Appointment TRN – Trainee VOL – Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency ZCL – Change to Lower Grade – CAO ZCV – Conversion to – Appt – CAO ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	100 - Career Appt 101 - Career-Cond Appt 107 – Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 – Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 – Transfer SES Career 146 – SES Noncareer Appt 147 – Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 – Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
			542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administration Accession
REH	Rehire	CMP – Competitive Appointment ECA - Expert/Consultant Appointment EMG – Emergency Appointment EXC – Excepted Service Appointment EXO – Executive Level Appointment FNA - Foreign National Appointment IPA – Intergovernmental Personnel Act MIL – Military OVS – Overseas Limited Appointment RES – Reinstatement/Reemployment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN - Trainee VOL - Volunteer Appointment VRA - VRA Appointment	100 - Career Appt 101 - Career-Cond Appt 107 – Emergency Appt 108 - Term Appt NTE 112 - Term Appt – PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 – Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 – Transfer SES Career 146 - SES Noncareer Appt 147 – Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 – Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
			571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administrative Accession

4.2 Hire – (Hire, Transfer, Hire NTE, Term, Temporary, and Appt NTE, etc.)

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on “Modifying Position” under “Position Information”.
B. If the Position does not exist, refer to the section on “Creating a Position” under “Position Information”.

Step 2 Process Personnel Action.

Administer Workforce > Administer Workforce (USF) > Use > Hire

Click on **“Add a New Value”**

Click on “**Add**” and the system will automatically assign an EMPLID when the Hire action is saved.

Data Control

1. Enter the **Actual Effective Date**.
2. Enter **Not to Exceed Date** if applicable. **Action** defaults to *HIR*. **PAR Status** defaults to *REQ*.
3. Select **Reason Code**.
4. Enter the **NOA Code**.
5. Enter **Authority #1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the > or < arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid** defaults to the PAR approving official for your sub-agency. The **Emplid** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter approving official in the **Emplid** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Personal Data

1. Enter **First Name**.
2. Enter **Middle Initial** or name or NMN if no middle initial.
3. Enter **Last Name**
4. Enter **Suffix** if appropriate
5. Enter **Gender** (default is female **-** change appropriately).
6. Enter **Ethnic Group**
7. Enter **Date of Birth**, must enter 4 digit year if prior to 1950.
8. Enter **Disability Code**.

9. Enter **National ID.** It is especially important to review the **National ID** entered for a new employee before saving the action.

Address Information

1. Enter **Address Data**.
   NOTE: The following warning will display if an incomplete address is entered: **"The address should consist of at least Address line #1 and the City, State, Country and Postal Code. Please verify the address before saving the record."** These five fields must be entered or this warning will be displayed. If entering FPO/APO addresses for overseas military delivery, FPO/AE AP or APO AE/AP should be entered in the "City" field and the "State" field remains blank. Although the blank "State" field causes the address warning to be displayed, the user should verify the rest of the address and save the record.

Personal Phone Numbers

1. Enter **Personal Phone Numbers**.
2. Select **Phone Type** and enter phone number.
3. If entering more than one phone number, press (+) while cursor is in **Phone Type** to insert a row.

Veterans Info

NOTE: *Refer to Guide to Processing Personnel Actions (chapters 4 & 7) for a detailed explanation.*

1. Enter applicable information. **Veterans Preference (1, 2, 3, 4, 5 or 6)** & **Veterans Pref RIF** (Y/N).
   - ⇨ If **Veterans Preference** code *2*, *3*, *4*, *5*, or *6*, **Veterans Pref RIF** should equal Yes.
   - ⇨ If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
   - ⇨ If **Type Appt** is *34* or *44*, (Sc*h* C), **Veterans Pref RIF** must equal No.
   - ⇨ If **Nature of Action** is *1XX*, then **Veterans Status** may not be "*N*".

Education Details

Refer to section entitled "How to Enter/Update Education Information"

🗀Job

1. Enter the **Position**. (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
2. Enter the **Transferred From Agency**, if necessary.

Benefits/FEHB Data

1. Select the appropriate **Benefit Program**.
2. Select **FEHB Eligibility**.

FEGLI/Retirement/FICA

1. Enter **FEGLI Code**.
2. Enter **Retirement Plan**.
3. Enter **FERS Coverage**.
4. Enter **Previous Retirement Coverage**.
5. Enter **Annuitant Indicator**.
6. Enter **Annuity Commencement Date**, if applicable.
7. Enter **CSRS Frozen Service** data if applicable.

🗀Position Data

1. Enter **Type Appt**; other data is grayed-out and defaults from position information.
   NOTE: *See* ***Relationship Edits Between NOA Code, Type Appt, Posn Occupied,*** *and* ***Tenure*** *table that follows this procedure.*

🗀Compensation

1. Select **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
3. If employee is on retained grade or pay, enter applicable information.
4. Enter **Annuity Offset Amount** if necessary. (This amount should be a **monthly** amount.)

Other Pay Information

1. Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

Accounting Info

1. Enter Appropriation Code in the **Account** field in the first account field, not in the Account Code field inside the box.

🗀Employment 1

1. Review **Service Computation Dates** and change if necessary.
2. Enter **LEO SCD** if applicable.
3. All SCD's except **TSP** will autopopulate with the effective date of the action. See information on "*Using the SCD Calculator*" under "*Basic Operations/Functions*."
4. Enter the **TSP** date. This date should not be prior to 01/01/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.
5. **Conv Begin Date** will default to effective date of action (only on certain Hires). Change if applicable.
6. The **Pay Chg Dt** and the **LEI Date** will autopopulate with the effective date of the action. If employee has prior service counting toward their WGI then enter the LEI Date from prior agency.

Appt Information

1. **Nature of Action Code** and **Current Authority #1/Authority #2** will autopopulate when action is saved in a "PRO" **PAR Status**. If Hire is NOA Code 5xx or 7xx, these fields must be changed to reflect most recent NOA Code 1xx data.
2. Enter **Appointment Limits: Amount, Hours** and **Days**, if applicable.
3. Enter **Special Employment Pgm** if applicable.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.

2. Review/Change **Last Promo Date**. This field defaults to effective date of hire. Change date, if appropriate.
3. Enter **Retained Grade Expires** dates if applicable.
4. Select **Tenure Group**. **NOTE:** Make sure the proper relationship exists between **NOA Code, Type Appt, Posn Occupied,** and **Tenure**. (Position Data page).
5. Enter **Permanent Data - RIF**, if applicable leave blank for pay plans EX, ES, EF, ED and EI.

Security Info

1. Review/Change **Security Clearance, Status,** and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.
5. Once action saves, the system will automatically open the Education page if it is was not previously entered.
6. Enter **Education** information as described in the section entitled "*How to Enter/Update Education Information*" under "*Basic Operation/Functions*". The education information must be entered or the action will not save as a PAR status of "PRO".
7. Once the education information saves, the system will automatically open the Performance Review page. The Rating Pattern and Rating Level must be entered before the hire action will save as "PRO". The Rating Level must equal "X" or "Z" for the initial row inserted with a Hire action. The Review Date does not appear on this page but this date will automatically default to the effective date of the hire when the initial performance record is saved. If you need to add performance rating history prior to hire use the following path: **Administer Workforce > Administer Workforce (USF) > Manage Performance > Use > Employee Review**. This same path is used to enter annual performance ratings.
8. More detailed information on Performance Review is described in the section entitled "How to Enter/Update Employee Review (Performance Rating) Information" under "Basic Operations/Functions".

Relationship Edits Between NOA Code, Type Appt, Posn Occupied, and Tenure

Edits are in place to ensure that the appropriate relationship is established between NOA Code, Type Appt, Posn Occupied, and Tenure for NOA Code 1XX and 5XX actions. The matrix table below shows the allowable combinations.

If NOA Code is:	Then Type Appt must be:	And Posn Occupied must be:	And Tenure must be:
124, 524	20	1	3
112, 512	20	1	3
101, 141, 501, 541	15	1	2
100, 500, 130, 140, 540	10 or 15	1	1 or 2
115, 122, 515, 522	20	1	0
108 or 508	20	1	3
142, 143, 145, 542, 543	50	3 or 4	0
146, 147, 546	55	3 or 4	0
148, 548	60	3 or 4	0
149, 549	65	3 or 4	0
170, 570	30, 32, 34, 36, 38, 40, 42, 44, 46 or 48	0, 1, 2 or 3	0, 1, 2 or 3
171, 571	40, 42, 44, 46 or 48	2	0 or 3
107, 507	20	1	3
120, 520	20	1	3
190, 590	20, 40, 42, 46 or 48	1 or 2	0 or 3

If one or more of these fields are incompatible, an error message will appear indicating that the discrepancy(s) must be resolved before the action will save.

4.3 Rehire

NOTE: *Only use this process if the employee's record previously existed in the CHRIS database.*

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on *"Modifying Position"* under *"Position Information"*.

B. If the Position does not exist, refer to the section on *"Creating a Position"* under *"Position Information"*.

Step 2 Process Personnel Action.

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Enter **Not to Exceed Date** if applicable.
5. Select **Action** – **Rehire**.
6. Select **Reason Code**.
7. Enter the **NOA Code**.
8. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the > or < to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Personal Data

1. Review all **Personal Data** fields and make changes if necessary.

Address Information

⇨ Review **Address Information**. If a change is necessary you must follow the procedure as described in section entitled *"Change of Address"* under *"Basic Operations/Functions"*. **NOTE:** The following warning will display if an incomplete address is entered: **"The address should consist of at least Address line #1 and the City, State, Country and Postal Code. Please verify the address before saving the record."** These five fields must be entered or this warning will be displayed. If entering FPO/APO addresses for overseas military delivery, FPO AE/AP or APO AE/AP should be entered in the "City" field and the "State" field remains blank. Although the blank "State" field causes the address warning to be displayed, the user should verify the rest of the address and save the record.

Personal Phone Numbers

⇨ Review/Change **Personal Phone Numbers**.
1. If a change is necessary, enter **Personal Phone Numbers**.
2. Select **Phone Type** and enter phone number.
3. If entering more than one phone number, press (+) while cursor is in **Phone Type** to insert a row.

Veterans Info

Note: *Refer to Guide to Processing Personnel Actions(chapters 4 & 7) for a detailed explanation.*

1. Review/Change applicable information. **Veterans Preference (1, 2, 3, 4, 5 or 6)** & **Veterans Pref RIF** (Y/N).
   - ⇨ If **Veterans Preference** is changed to code *2*, *3*, *4*, *5*, or *6*, **Veterans Pref RIF** should equal Yes.
   - ⇨ If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
   - ⇨ If **Type Appt** is *34* or *44*, (Sc*h* C), **Veterans Pref RIF** must equal No.
   - ⇨ If **Nature of Action** is *1XX*, then **Veterans Status** may not be "*N*".

Education Details

Review Education data, if necessary upon completion of this action make changes or additions as detailed in section entitled "How to Enter/Update Education Information"

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position**. (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.
5. Enter the **Transferred From Agency**, if necessary.

Benefits/FEHB/Data

1. Review /Change the **Benefit Program**.
2. Review/Change **FEHB Eligibility**.

FEGLI/Retirement/FICA

1. Review/Change **FEGLI Code**.
2. Review/Change **Retirement Plan**.
3. Review/Change **FERS Coverage.**
4. Review/Change **Previous Retirement Coverage.**
5. Review/Change **Annuitant Indicator**.
6. Enter **Annuity Commencement Date**, if applicable.
7. Enter **CSRS Frozen Service** data if applicable.

🗀Position Data

1. Review/Change **Type Appt**; other data is grayed-out and defaults from position information.
   NOTE: *See **Relationship Edits Between NOA Code, Type Appt, Posn Occupied,** and **Tenure** table that preceeds this procedure.*

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
3. If employee is on retained grade or pay, enter applicable information.
4. Enter **Annuity Offset Amount** if necessary. (This amount should be a **monthly** amount.)

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field. To delete an Earnings Code carried forward from prior row press (-) or Alt-8, enter.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field in the first Account field, not the Account Code inside the box.

🗀Employment 1

1. Review **Service Computation Dates** and change if necessary. See information on "*Using the SCD Calculator*" under "*Basic Operations/Functions*."
2. Enter **LEO SCD** if applicable.
3. Enter the **TSP** if blank. This date should not be prior to 01/01/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.
4. **Conv Begin Date** will default to effective date of action, if applicable.
5. The **Pay Chg Dt** and the **LEI Date** will autopopulate with the effective date of the action, if applicable. If employee has prior service counting toward their WGI then enter the LEI date from prior agency.

Appt Information

1. **Nature of Action Code** and **Curr Authority #1/Authority #2** will autopopulate when action is saved in a "PRO" **PAR Status**. If rehire is NOA Code 5xx or 7xx, these fields must be changed to reflect most recent NOA Code 1xx data.
2. Enter **Appointment Limits: Amount, Hours** and **Days**, if applicable.
3. Enter **Special Employment Pgm** if applicable.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
2. Review/Change **Last Promo Date**. This field defaults to effective date of hire. Change date, if appropriate.
3. Enter **Retained Grade Expires** dates if applicable.
4. Review/Change **Permanent Data - RIF**, if appropriate leave blank for pay plans EX, ES, EF, ED and EI.
5. Review/Change **Tenure Group**. **NOTE:** Make sure the proper relationship exists between **NOA Code, Type Appt, Posn Occupied,** and **Tenure** (Position Data page).

Security Info

1. Review/Change **Security Clearance, Status,** and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

Education Details

Review/Update **Education** information as described in the section entitled *"How to Enter/Update Education Information"* under "*Basic Operation/Functions*". The education information must be entered or the action will not save as a PAR status of "PRO".

Administer Workforce > Administer Workforce (USF) > Manage Performance > Use > Employee Review

1. Review/Update the Employee Review Information. In most cases you will need to enter a new Employee Review row using the effective date of the Rehire to reflect the employees rating pattern and rating level of "X" or "Z". In some cases you may not need to enter a new row:

   Example: Employees most recent Employee Review row is within a the last year.

More detailed information on Performance Review is described in the section entitled “How to Enter/Update Employee Review (Performance Rating) Information” under “Basic Operations/Functions.

5 Change Actions

Contents

5.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Change Actions

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
DTA	Data Change	B&R - Change Fund Type/B&R Code	750 - Continuance NTE
		CAC – Change - Agency Code	755 - Exception to RIF Release
		CAI - Change – Annuitant Indicator	780 - Name Change From
		CBU - Change – Bargaining Unit	781 - Change in Work Schedule
		CCP - Change/Correct Position Number	782 - Change in Hours
		CDE - Change in Data Element	792 - Change in Duty Station
		CDP – Correction/Change Department	800 - Change in Data Element
		CFC - Change – FLSA Category	803 - Change in Retirement Plan
		CJC – Correction/Change Job Code	805 - Elected Full Living Benefits
		COC – Change – Occup Code	806 - Elected Partial Living Benefits
		CON – Change in Organization Name	880 - Change in Tenure Group
		CPI – Change – Personnel Office ID	881 - FEGLI Change
		CPO – Change – Position Occupied	882 - Change in SCD
		CPR – Change – Pay Rate Determinate	883 - Change in Vet Preference for RIF
		CSA – Change in Sub-Agency	888 - Denial of WGI
		CSO – Change in Sub-Agency & Org Name	904 – Change Fund Type/B&R Code
		CSV – Change in Supervisor	927 – Change in Sub-Agency
		CTL – Change in Title	928 - Change in Sub-Agency & Org Name
		DTY – Change in Duty Station	929 - Change in Organization Name
		DWI – Denial of Within Grade Increase	933 - Change in Title
		EMP - At Employees Request	966 - Change/Correct Non-SF-50 Element
		EXC – Exception to RIF Release	
		FEG – FEGLI Change	
		FLB – Elected Full Living Benefits	
		FTI – From FT to Intermittent	
		FUL – From Part-Time to Full-Time	
		HRS – Change in Hours	
		IFT – From Intermittent to FT	
		IPT – From Intermittent to PT	
		NMC – Name Change	
		NSF – Change/Correct Non-SF-50 Element	
		NTE – Continuance NTE	
		OTH – Other	
		PAR – From Full-Time to Part-Time	
		PLB – Elected Partial Living Benefit	
		PTI – From PT to Intermittent	
		RET - Change in Retirement Plan	
		SCD - Change in SCD	
		STC - Status Change	
		TEN - Change in Tenure Group	
		VET - Change in Veterans Preference	
EXT	Extension of NTE Date	CON – Conversion to Appt NTE	515 - Conversion to Appt NTE
		EAN - Extension of Appt NTE	571 - Conv to Excepted Appt NTE
		EEA - Conversion to Exc Appt NTE	760 - Extension of Appt NTE
		EFN - Extension of Furlough NTE	762 - Extension of SES Limited Appt NTE
		ELP - Extension of LWOP NTE	765 – Ext of Term Appt NTE

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
		EPC - Extension of Position Change NTE EPN - Extension of Promotion NTE ESE - Extension of SES Limited Appt NTE ETA - Ext of Term Appt NTE EXT - Extension of NTE Date SLG - Assignment to State/Local Gov.	769 - Extension of Prom NTE 770 - Extension of Position Change NTE 772 - Extension of Furlough NTE 773 - Extension of LWOP NTE
PLA	Leave With Pay	PDR – Pending Disability Retirement PTD – Partial/Total Disability SEA – Seasonal	480 – Sabbatical NTE
POS	Position Change	CAO - Position Change – CAO COC – Change in Occupational Code CON – Change in Org Name CSA – Change in Sub-Agency CSO – Change Sub-Agency & Org Name CSV – Change in supervisor EMP – Employee Request FPP - Failed Probationary Period ILR - In Lieu of RIF INA - Position Inactivated JRC - Job Re-Classification NCS - Issuance of New Class Standard NEW - New Position OTH – Other PRO – Promotion REA – Realignment RED – Reorganization REL – Realignment - CAO RIF - Resulting from RIF RSG – Reassignment STA - Position Status Change TTL – Title Change UPD – Position Data Update XFR – Transfer	500 - Conversion to Career Appt 721 - Reassignment 740- Position Change 790 - Realignment 933 – Change in Title
REC	Return from Suspension/Furlough	RTD - Return to Duty	292 - Return to Duty
RFL	Return from LWOP	RFL - Return from LWOP	280 - Placement in Pay Status 292 - Return to Duty 293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC – Disciplinary Action DSB - Disorderly Behavior ILA - Illegal Action IND - Suspension – Indefinite NTE - Suspension NTE	450 - Suspension NTE 452 - Suspension - Indefinite
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO CRM – Competitive Reassignment CTA - Conv to Appointment EER - Employee Request EXC - Exception to Competition FPP - Failed Managerial/Supervisory Period ILR - In Lieu of RIF MRR - Manager Request	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt – PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
		MSP - MSPB Decision	524 - Conv to Appt-Status Quo
		NCS - Issuance of New Classification Standards	540 - Conv to Reins-Career
		OMB - Resulting from OMB Circular A-76	541 - Conv to Reins-Career-Cond
		PRO – Promotion	542 - Conv to SES Career Appt
		PSC - Position Change - CAO	543 - Conv to Reins-SES Career
		PSN - Position Change	546 - Conv to SES Noncareer Appt
		RCA – Reassignment - CAO	548 - Conv to SES Ltd Term Appt
		RCL - Resulting from Reclassification	549 - Conv to SES Ltd Emergency
		REA – Realignment	570 - Conv to Exc Appt
		RIF – RIF	571 - Conv to Exc Appt NTE
		RLC – Realignment - CAO	590 - Conv to Provisional Appt NTE
		ROR - Reorganization	721 – Reassignment
		ROT – Reassignment (Other)	740 - Position Change
		RPL - Resulting from RPL, CTAP, ICTAP	741 - Position Change NTE
		SES - Senior Executive Service Appt	790 – Realignment
		VRA - VRA Appointment	

5.2 Reassignment Across Sub-Agencies

Movement of an employee across Sub-Agencies is defined as any personnel action taken to move an employee from the field to Headquarters, from Headquarters to the field, or from one field office to another field office. Movement of an employee between program offices at Headquarters is not covered by this procedure since users at Headquarters have access to employees for all Sub-Agencies serviced at Headquarters. Movement across Sub-Agencies can involve any number of personnel action types from a simple reassignment to the promotion of a grade 15 to an SES position. The key to whether this procedure must be utilized is whether the employee will be serviced by a different Servicing Personnel Office.

The following steps must be completed when an employee is selected for a position in a different DOE sub-agency:

The gaining sub-agency will:

- Contact the losing sub-agency to establish the effective date of the transfer.
- Establish a new position or activate an existing position in CHRIS ensuring that the effective date of the position is on or before the effective date of the employee's transfer to the new sub-agency.
- Complete the Request for Initiation of Sub-agency Transfer and fax to the HR POC of the gaining sub-agency for concurrence. This concurrence can be obtained through E-mail messages as long as all required data fields listed on the form are included in the E-mail and the E-mail request is sent to **chrisfunctional@netl.doe.gov** through the losing HR POC. There must be clear evidence in the E-mail received by the CHRIS Functional staff that the losing sub-agency concurs in the transfer.
- Verify all data entered by the CHRIS Functional staff, make changes as appropriate and finalize the action for the transfer by changing the PAR Status to "PRO".
- Print and distribute SF-50's and request the Official Personnel Folder from the losing HR office.

The losing sub-agency will:

- Coordinate the effective date of the transfer with the losing supervisor and provide this date to the gaining sub-agency.
- Process all actions for the employee that will be effective prior to the date of transfer to the new sub-agency.
- Concur in the employee's release to the new sub-agency and forward this concurrence to the CHRIS Functional staff by signing the Request for Initiation of Sub-agency Transfer or through E-mail to **chrisfunctional@netl.doe.gov**.

The CHRIS Functional staff will:

- Verify that all required information has been provided by the gaining sub-agency and that proper concurrence for the transfer has been obtained from the losing sub-agency.
- Enter the transfer action in CHRIS in PAR Status "REQ" following receipt of the Request for Initiation of Sub-Agency Transfer or E-mail.
- Advise the gaining sub-agency that the transfer action has been initiated in CHRIS and that it is ready to be finalized by their staff.

REQUEST FOR INITIATION OF SUB-AGENCY TRANSFER
(To be completed to gaining Sub-agency)

To CHRIS Functional Staff:

The employee shown below has been selected for a position in the new DOE sub-agency referenced below. Please initiate the sub-agency transfer action in CHRIS and advise the gaining HR office when the action has been entered in “REQ” PAR Status.

Data Field	Enter Employee & Position Information Referenced in First Column
Employee’s Name	
Employee’s NID (SSN)	
EMPLID (If available)	
Gaining Sub-agency	
Losing Sub-agency	
Effective Date	
NTE Date (If any)	
Action	
Reason Code	
NOA Code	
Authority 1	
Authority 2 (If any)	
New Position Number	
New Official Position Title	
New Pay Plan	
New Occupational Series	
New Grade	
New Step	
New Base Pay (If Pay Plan is EJ, EK, EN, SL or ST)	
New Account Code	

Action concurred by:

HR POC/Personnel Specialist (Gaining Sub-agency):

_____________________________________ ____________________
Signature Date

HRPOC/Personnel Specialist (Losing Sub-agency):

_____________________________________ ____________________
Signature Date

5.3 Reassignment Between DOE PeopleSoft Systems

NOTE: If employee is transferring to BPA or FERC an Administrative Separation must be processed to terminate status in CHRIS.

The following Actions, Reason Codes, Nature of Actions, and NOA Codes will be used to process hires and separations of DOE employees moving between different DOE PeopleSoft systems (e.g., BPA HRMIS to DOE CHRIS, DOE CHRIS to BPA HRMIS, or, FERC MAPS to DOE CHRIS or DOE CHRIS to FERC MAPS):

Action	Action Description	Action/Reason Code	Nature of Action/Codes
HIR	Hire	ZCV – Conversion to Appt-CAO	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt - PER 515 - Conv to Appt NTE 540 - Conv to Reins - Career 541 - Conv to Reins - Career-Cond 542 - Conv to SES Career Appt 543 - Conv to Reins - SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt NTE 549 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exc Appt 571 - Conv to Exc Appt NTE 590 - Conv to Provisional Appt NTE
		ZPR – Promotion-CAO	702 - Promotion 703 - Promotion NTE
		ZCL – Change to Lower Grade-CAO	713 - Change to Lower Grade
		ZRS – Reassignment-CAO	721 - Reassignment
		ZPS – Position Change-CAO	740 - Position Change 741 - Position Change NTE
TER	Termination	ZCV – Conversion to Appt-CAO	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt - PER 515 - Conv to Appt NTE 540 - Conv to Reins - Career 541 - Conv to Reins - Career-Cond 542 - Conv to SES Career Appt 543 - Conv to Reins - SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt NTE 549 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exc Appt

Action	Action Description	Action/Reason Code	Nature of Action/Codes
		  ZPR – Promotion-CAO ZCL – Change to Lower Grade-CAO ZRS – Reassignment-CAO ZPS – Position Change-CAO	571 - Conv to Exc Appt NTE 590 - Conv to Provisional Appt NTE 702 - Promotion 703 - Promotion NTE 713 - Change to Lower Grade 721 - Reassignment 740 - Position Change 741 - Position Change NTE

DO NOT USE THE ABOVE REASON CODES TO PROCESS ACTIONS FOR EMPLOYEES MOVING BETWEEN SUB-AGENCIES WITHIN DOE AS THESE EMPLOYEES ARE ALREADY IN CHRIS.

Follow the Hire or Separation processing procedure in your CHRIS Users' Manual. A generic agency of "XX" has been set up in the Agency Table for "Bonneville Power Administration". Enter "XX" as the "Transferred From Agency" or the "Transferred To Agency" on the Job Page to print "Bonneville Power Administration" on the "From" or "To" side of the SF-50. Use "H5" for "Federal Energy Regulatory Commission".

- When processing a 5XX or 7XX action for an employee who has never held a record in CHRIS the from side (Blocks 7-14) of the SF-50 will print blank.

- When processing a 5XX or 7XX action for an employee who previously had a record in CHRIS the SF-50 will print with incorrect information on the from side (Blocks 7-14). It will print with the information that was valid when the employee previously separated on a prior DOE appointment.

In the above mentioned situations, an SF-50 must be produced outside of CHRIS for distribution and filing.

5.4 Reassignment

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".
B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information".

Step 2 Process Personnel Action.

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ.*
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < and > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position**. (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**.
3. If employee is on retained grade or pay, enter applicable information.

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field in the first account field not in the Account Code inside the box.

🗀Employment 1

1. Enter **LEO SCD** if applicable.
2. The **Pay Chg Dt** will autopopulate with the effective date of the action, if there is an increase/decrease in Base Pay or unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row within the record.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
2. Review/Change/Enter **Retained Grade Expires** dates as appropriate.
3. Review/Change **Permanent Data - RIF**.

Security Info

1. Review/Change **Security Clearance, Status**, and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

5.5 Realignment

Step 1 Modify Position.

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".

Step 2 Process Personnel Action.

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position**. (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.
5. Verify the new **Department** and **Location**.

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**.
3. If employee is on retained grade or pay, enter applicable information.

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field in the first account field, not in the Account Code field inside the box.

🗀Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action, if there is an increase/decrease in Base Pay or unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior <u>non-canceled</u> row within the record.

🗀Employment 2

1. Review/Change **Permanent Data RIF**, if applicable. Leave blank for pay plans for EX, ES, EF, ED and EI.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

5.6 Change in Title

Step 1 Modify Position

Develop Workforce > Manage Positions (USF) > Use > Position Data

🗀Description

1. Select **Position**.
2. **Insert** a Row (+).
3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
4. Select **Reason**.

🗀Job Information

1. Review/Change the **Job Code** (Click on the magnifying glass to search for variables **-** You <u>must</u> search by Sub-Agency. **Pay Plan**, **Sal Plan**, and **Grade** will default from the **Job Code**. When processing retained grade actions, the **Job code** should reflect the position to which the employee is being assigned – <u>not</u> the position they came from in the retained grade It will then be necessary to review all of the job code fields before saving the position record to determine if the job code fits the position being created.

US Federal Flag

1. Review/Change the **Organizational Position Title** (Click on the magnifying glass to search).
2. Save.

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation

1. Enter **Step**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.7 Change in Retirement Plan

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. Insert a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows bar to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Job

FEGLI/Retirement/FICA

1. Change **Retirement Plan**.
2. Change **FERS Coverage**.
3. Change **Previous Retirement Coverage**.
4. Review/Change **Annuitant Indicator**.
5. Enter **Annuity Commencement Date**, if applicable.
6. Enter **CSRS Frozen Service** data if applicable.

🗀Employment 1

1. Enter the **TSP** if blank. This date should not be prior to 1/1/84. This field is mandatory for FERS employees. Leave blank for CSRS employees.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.8 Change in Tenure

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Position Data

1. Change **Type Appt** if necessary. Other data is grayed-out and defaults from position information.

Employment 1

1. **Career Conv Date** autopopulates with effective date of action.

Employment 2

1. Change **Tenure**.
   <u>**NOTE:**</u> Make sure the proper relationship exists between **NOA Code, Type Appt, Posn Occupied,** and **Tenure** (Position Data page).

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

POSN OCCUPIED	TENURE CODE	TYPE APPT	AUTHORITY CODE 1 or 2	ACTION
1 - Competitive	2	15		Change in Tenure
2 - Excepted	2	30,32,34,38	**IS NOT -** J8M, WTM, WUM	Change in Tenure
2 - Excepted	2	30, 38	**IS -** J8M, WTM, WUM	Conversion to Competitive Service

5.9 Change in Veterans Preference for RIF

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows bar to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Personal Data

Veterans Info

NOTE: *Refer to Guide to Processing Personnel Actions(chapters 4 & 7) for a detailed explanation.*

1. Enter applicable information. **Veterans Preference (1, 2, 3, 4, 5 or 6)** & **Veterans Pref RIF** (Y/N).
   - ⇨ If **Veterans Preference** is changed to code *2, 3, 4, 5,* or *6*, **Veterans Pref RIF** should equal Yes.
   - ⇨ If **Pay Plan** is *ES* or *EX*, **Veterans Pref RIF** must equal No.
   - ⇨ If **Type Appt** is *34* or *44*, (Sc*h* C), **Veterans Pref RIF** must equal No.
   - ⇨ If **Nature of Action** is *1XX*, then **Veterans Status** may not be "*N*".

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.10 Change Fund Type/B&R Code

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Compensation

Accounting Info

1. Enter Appropriation Code in the **Account** field.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.11 Change in Hours

Step 1 Modify Position

Develop Workforce > Manage Positions (USF) > Use > Position Data

🗀Description

1. Select **Position**.
2. **Insert** a Row (+).
3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
4. Select **Reason**.

🗀Job Information

1. Change **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.
2. Save.

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press **(-)** to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Position

1. Verify **Standard Hours**.

🗀Compensation

1. Enter **Step**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

5.12 Change in Work Schedule

Step 1 Modify Position

Develop Workforce > Manage Positions (USF) > Use > Position Data

Description

1. Select the **Position**.
2. **Insert** a Row (+).
3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
4. Select **Reason**.

Job Information

1. Review/Change **Standard Hours/Weekly**. The **Standard Work Days** will default based on the **Standard Hours**, do not change.

Federal Data

1. Change **Work Schedule**. Once entered the appropriate schedule will default the Full/Part-Time field on the Job Information page.

Return to Description

1. Save.

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Position

1. Verify **Work Schedule** and **Standard Hours.**

🗀Compensation

1. Enter **Step**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

5.13 Change in Duty Station

Step 1 Modify Position

Develop Workforce > Manage Positions (USF) > Use > Position Data

🗀Description

1. Select the **Position**.
2. **Insert** a Row (+).
3. **Effective Date** and **Status Date** should be on or before the effective date of the action.
4. Select **Reason**.

🗀Work Location

1. Enter **Location Code** and tab (Click on the magnifying glass to search).

US Federal Flag

1. Review **Competitive Area**, change if necessary.
2. Review **Competitive Level**, change if necessary.

🗀Return to Description

1. Save.

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation

1. Enter **Step**.

🗀Employment 2

1. Review/Change **Permanent Data RIF - Competitive Area** and **Competitive Level**.
2. **Pay Change Date** will autopopulate with effective date of action if there is a positive or negative affect on **Base Pay**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.14 Name Change

NOTE: This procedure should not be used to correct an action that was processed with an error in the name fields.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Personal Data

1. Type new name over old name.
2. If **Address Information** needs to be updated, refer to the section entitled "Change of Address" under "Basic Operations/Functions" .

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** with the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

NOTE: *Once action is saved, the new name will not appear until you cancel out of the action and select the employee from the database with the new name.*

5.15 Change in Service Computation Date

THIS PROCEDURE ONLY APPLIES TO THE SCD THAT APPEARS IN BLOCK 31 OF THE SF-50. IF YOU ARE CHANGING ANY OTHER SCD, PROCESS A "966" ACTION.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Employment 1

1. Change the **Leave** date and other **Service Computation Dates** as appropriate. See information on "*Using the SCD Calculator*" under "*Basic Operations/Functions*."

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.16 FEGLI Change

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Job

FEGLI/Retirement/FICA

1. Enter **FEGLI Code**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.17 Suspension NTE or Suspension Indefinite

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Employment 2

Non Pay Data

1. Enter **Last Date Worked**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

.

5.18 Leave Without Pay

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date** and **Not to Exceed Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   a) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Employment 2

on Pay Data

1. Enter **Last Day Worked**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.19 Extension of Leave Without Pay

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date** and **Not to Exceed Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

5.20 Return to Duty

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Employment 1

1. Review the **Service Computation Dates** and change if necessary.
2. If LWOP is in excess of allowable amount, enter recalculated **Leave** date.
3. Adjust **WGI Due Dt** if LWOP affected the waiting period. To adjust click on the **Manual** button in the Override Box and make a change to the **WGI Due Dt**. DO NOT deselect the **Manual** button.

Employment 2

Non Pay Data

1. If applicable enter **Non Pay Hours** for **SCD, Probation,** or **Tenure** (optional use).
2. The **Last Day Worked** date that was entered on the LWOP action will clear once the RTD action is saved.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

5.21 Conversion/Conversion NTE

Step 1 Create or Modify Position

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".
B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information".

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

Benefits/FEHB Data

1. Review/Change the **Benefit Program**.
2. Review/Change **FEHB Eligibility**. **NOTE:** This field is a required field for new appointments and must also be changed if conversion action is from a temporary to permanent position.

FEGLI/Retirement/FICA

1. Review/Change **FEGLI Code**.
2. Review/Change **Retirement Plan**.
3. Review/Change **FERS Coverage**.
4. Review/Change **Previous Retirement Coverage**.
5. Review/Change **Annuitant Indicator**.
6. Enter **Annuity Commencement Date**, if applicable.
7. Enter **CSRS Frozen Service** data if applicable.

🗀Position Data

1. Review/Change **Type Appt**; other data is grayed out and defaults from position information.
   NOTE*: See Relationship Edits Between* ***NOA Code****,* ***Type Appt****,* ***Posn Occupied,*** *and* ***Tenure*** *that follows the Hire procedure.*

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action. These dates represent entry dates in CHRIS and they are not editable.
3. If employee is on retained grade or pay, enter applicable information.
4. Enter **Annuity Offset Amount** if necessary. (This amount should be monthly amount).

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row (+) in the **Earnings Code** field.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

🗀Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
2. Review/Change **LEI Date**.

Appointment Data

1. **Nature of Action Code** and **Curr Appt Authorities** will update with new appointment information when action is saved in an PRO **PAR Status**.
2. Enter **Special Employment Pgm** if applicable.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
2. Review/Change **Last Promo Date**.
3. Enter **Retained Grade Expires** dates if applicable.
4. Review/Change **Permanent RIF - Data**. Leave blank for pay plans EX, ES, EF, ED and EI.
5. Review/Change **Tenure Group**. **NOTE:** Make sure the proper relationship exists between NOA Code, **Type Appt**, **Posn Occupied**, and **Tenure** (Position Data page).

Security Info

1. Review/Change **Security Clearance**, **Status**, and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

EMPLOYEE REVIEW INFORMATION: Additional Performance Requirements for an Employee Who Moves into an ES position: When an employee moves into an ES position from a different Pay Plan such as GS, GM, SL, ST, EJ or EK) three new performance records may be required in CHRIS if the employee receives a rating for their prior position following the effective date of their conversion. A new record will be needed for each of the following:

Record 1:
A new record for the conversion action to change the employee's Rating Pattern and Rating Level. In the above example the Review Date is the effective date of the conversion, the Rating Pattern is "F" and the Rating Scale is "X=Not rated". If Review From and To Dates carry forward from prior performance record, delete these dates on this new record. This record must be added when the conversion action is changed to PRO using the following path: **Administer Workforce > Manage Performance > Use > Review Rating**.

Record 2:
A new record to add the performance appraisal given to the employee for the prior position occupied.

Record 3:
A new record to change the Rating Pattern back to "F" and Rating Level back to "X=Not Rated (if the effective date for Record 2 above is later than the conversion to the SES position). The Review Date for this record will be the day following the Review Date for the performance appraisal for the prior position (Record 2 above).

It is necessary to add these additional performance records because OPM has added a CPDF edit to ensure that ES employees have a valid Rating Pattern. The correct Rating Pattern for ES employees in DOE is "F".

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

5.22 Position Change

Step 1 Create or Modify Position

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".

B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information".

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Enter **Not to Exceed Date** if applicable.
5. Select **Action**.
6. Select **Reason Code**.
7. Enter the **NOA Code**.
8. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Position Data

1. Enter **Type Appt**; other data is grayed out and defaults from position information.

🗀Compensation

1. Review/Change **Pay Rate Determinant**; change if necessary. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action if different from previous row.
3. If employee is on retained grade or pay, enter applicable information.

Other Pay Information

1. Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row in the **Earnings Code** field.

Accounting Info

1. Enter Appropriation Code in the **Account** field.

🗀Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
2. Review/Change **LEI Date**.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
2. Enter **Retained Grade Expires** dates as appropriate.
3. Review/Change **Permanent Data RIF**. Leave blank for pay plans EX, ES, EF, ED and EI.
4. Review/Change **Last Promotion Date**, if a positive change in grade.

Security Info

1. Review/Change **Security Clearance, Status,** and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

5.23 Non SF-50 Change/Correction -NOA Code - 966

Important: This action is only used for changing/correcting data elements that *DO NOT appear on a SF-50*. All data elements that appear on the SF-50 will be grayed out when this NOA Code is selected. Verify whether this change/correction will effect the SF-50; if so, a NOA Code "002" correction will need to be processed. If data you are changing/correcting effects the position, you must first make the appropriate change/correction on the position data by inserting a new row.

Note: If the action you are entering is an intervening action, you must be in correction mode to insert remarks or change tracking data.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action – Data Change**.
5. Select **Reason Code**.
6. Enter the **NOA Code-** 966.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.
2. **Remarks** *MUST* be entered indicating the changes made to the record.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Review each page and make necessary change/changes. If changing/correcting an SCD, refer to "*Using SCD Calculator*" under "*Basic Operations/Functions*."

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

5.24 SF-113 Ceiling Flag

Federal agencies are required to report staffing and salary data to the Office of Personnel Management (OPM) each month. Currently, the SF-113-A (Monthly Report of Federal Civilian Employment - staffing data) is being generated from CHRIS with some data adjustments made outside of CHRIS before the report is sent to OPM. The SF-113-G (Monthly Report of Full-time Equivalent/Work-Year Civilian Employment --salary data) is being reported from PAYS.

CHRIS users have probably noticed the SF113G Ceiling check box on the Position Data page in the HR Processing menu. The check box currently turns on automatically as new actions are processed. However, there are some situations when the check box needs to be turned off (e.g., hires and other actions processed for employees under the Student Career Experience Program). CHRIS has been programmed to turn off the ceiling flag when actions are processed and the following conditions apply:

1. Participants in the Student Educational Employment Program, identified by current appointment authority codes YBM, YGM, Y3M, Y1M, Y2M, Y1K, Y2K, Y3K, Y4K and Y5K. (These were formerly Summer Aids and participants in The Stay-in-School Program, The Federal Junior Fellowship Program, and the Cooperative Education Program [Co-op] Program). The flag will be turned off based solely on the Current Appointment Authority from the Employment 1 page, Appt Data subpage; however, users should always update the Special Employment Pgm, as appropriate, when processing actions. These authorities relate to Special Employment Programs 54 and 62.

2. Persons appointed under the Worker Trainee Temporary Appointment Pending Establishment of a Register (TAPER) authorization under appointment MBM (e.g., Welfare to Work, Special Employment Program 10). The ceiling flag will be turned off if Current Appointment Authority equals MBM.

3. Persons appointed in the Worker-Trainee Program who are in developmental jobs (for 12-month period from date of appointment) who were appointed under the Veterans Readjustment Appointment (VRA). This will be based on a new Special Employment Program -- 58 VRA/Worker-Trainee.

4. Persons appointed to a special ceiling exempt position as indicated by Special Employment Program ID--11 Special Exemption to Ceiling.

5. Persons appointed to a summer position, Special Employment Program ID--56 Sum Prog Reg 316.402(a).

6. Employees on leave without pay, furlough, or suspension whose absence actually exceeds or is scheduled to exceed 30 calendar days. The ceiling flag will also be turned on automatically when these employees return to duty.

7. Employees serving in Pay Plans ED, EF and ZZ (Without Compensation).

When the above conditions no longer apply, the ceiling flag will be turned on automatically when a personnel action is processed which moves an employee out of an exempt category. However, in some cases, a NOA Code 966 Change/Correct Non-SF-50 will need to be processed to turn on the ceiling flag. These include:

- ⇨ Employees who are in developmental jobs who complete more than one year under a Worker-Trainee Program (See conditions 2 and 3 above). A new public tickler query "Tick_Worker-Trainee Appts" has been provided to remind users to process NOA Code 966 to turn on the ceiling flag in these cases. This query should be run each pay period using the first day of the next pay period for the As of Date. The report will include all employees who will complete a year under the Worker-Trainee Program up to the As of Date if the ceiling flag is off.

In rare situations, CHRIS users will need to turn off the SF-113G ceiling flag because CHRIS will not contain sufficient logic to make the determination automatically. To do this, the user will process a NOA Code 966 Change/Correct Non-SF-50 data and turn off the SF-113-G Ceiling flag on the Position Data page in HR Processing for the following situations:

1. The employee is on leave with pay pending separation by disability retirement and meets both of the following criteria:
   a) The employee's application for disability retirement has been approved by the Office of Personnel Management; and
   b) The employee's use of sick leave after the approval date actually exceeds, or is scheduled to exceed, 30 calendar days.

2. The employee is on leave with pay pending separation by optional retirement and meets all five of the following criteria:
   a) The employee has to retire because of ill health; and
   b) The employee is on sick leave and the employing agency has received a licensed physician's certificate covering the entire period for which the employee has requested sick leave; and
   c) The employee meets age and service requirements for optional retirement; and
   d) A Standard Form (SF) 2801, "Application for Immediate Retirement" package has been submitted for retirement to become effective when the employee's sick leave expires; and
   e) The employee's use of sick leave after the approval date exceeds, or is scheduled to exceed, 30 calendar days.

3. The employee received an on-the-job injury or illness and meets the following criteria:
   a) Approval for worker's compensation has been received from the Department of Labor; and
   b) Use of sick leave after the approval date exceeds, or is scheduled to exceed, 30 calendar days.

Process a NOA Code 966 (in preceding section) Change/Correct Non-SF-50 data and turn off the SF-113-G Ceiling flag on the Position Data page in HR Processing.

5.25 Denial of Within Grade Increase

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Employment 1

1. **WGI Status** will automatically default to **Denied**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

5.26 Termination of Grade Retention

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. This will be the day after the Grade Retention expires. **PAR Status** defaults *REQ.*
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < and > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Compensation

1. Review/Change **Pay Rate Determinant** – Based on selection of the **Pay Rate Determinant** the **Retained Grade Expires** fields will clear. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step** if employee is on a pay table with steps.
3. If employee is entitled to pay retention, select the appropriate **Pay Rate Determinant** and enter the base pay.

🗀Employment 2

1. If **Retained Grade Begin** and **End Dates** are populated, they should be removed.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

6 Pay Change Actions

Contents

6.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Pay Change Actions

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 170 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
AWD	Award - Monetary	GNG – Group Gainsharing Award GNS – Gainsharing Award ING - Group Invention Award (Patent) INV – Individual Invention Award (Patent) NBG – Superior Accomplishments/Personal Effort Group Cash Award - NBO-WAPA Only NBO – Superior Accomplishment/Personal Effort Individual Cash Award - NBO-WAPA Only NBS - Superior Accomplishment/Personal Effort Individual Cash Award - NBS-WAPA Only NSG - Superior Accomplishment/Personal Effort Group Cash Award - NBS-WAPA Only OTG - On-The-Spot Group Award OTS - On-The-Spot Individual Award PAW – SES Performance Award PCA - Performance Rating Cash Award RNK – SES Rank Award SCA - Superior Accomplishment/Personal Effort Individual Cash Award SCG - Superior Accomplishment/Personal Effort Group Cash Award SGG - Group Suggestion Award SUG – Individual Suggestion Award TGS - Group Time-Off Suggestion Award TOP - Time-Off Performance Award TOS - Individual Time-Off Suggestion Award TSA - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Group Cash Award TSI - Travel Savings Incentive	840 - Individual Cash Award 841 - Group Cash Award 842 - Individual Suggestion/Invention Award 843 - Group Suggestion/Invention Award 845 - Travel Savings Incentive 846 - Individual Time-Off Award 847 - Group Time-Off Award 878 - SES Rank Award 879 - SES Performance Award
BON	Bonus	REC – Recruitment Bonus REL – Relocation Bonus SEP – Separation Incentive RFB – Referral Bonus	815 - Recruitment Bonus 816 - Relocation Bonus 825 - Separation Incentive 848 – Referral Bonus
DEM	Change to Lower Grade	CAO – Change to Lower Grade - CAO CMP – Competitive Selection EMP - At Employee's Request	713 - Change to Lower grade 740 - Position Change 741 - Position Change NTE

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		FPP – Failed Probationary Period ING - RIF - No Grade Retention MIS – Misconduct MSP – MSPB Decision NCS – Issuance of New Class Standards OMB – Resulting from OMB Circular A-76 ORG – Reorganization OTH – Other PLF – Placement in lieu of RIF PSC – Position Change RCL – Resulting from Reclassification RFF - Resulting from RIF RGR - RIF - Grade Retention RPL – Resulting from RPL, CTAP, ICTAP RTN – Change to Lower Grade TTP – Termination of Temporary Promotion USP – Unsatisfactory Performance VRA – VRA Appointment	
DTA	Data Change	B&R - Change Fund Type/B&R Code CAC – Change - Agency Code CAI - Change – Annuitant Indicator CBU - Change – Bargaining Unit CCP - Change/Correct Position Number CDE - Change in Data Element CDP – Correction/Change Department CFC - Change – FLSA Category CJC – Correction/Change Job Code COC - Change – Occup Code CON – Change in Organization Name CPI - Change – Personnel Office ID CPO - Change – Position Occupied CPR - Change – Pay Rate Determinate CSA – Change in Sub-Agency CSO – Change in Sub-Agency & Org Name CSV – Change in Supervisor CTL – Change in Title DTY - Change in Duty Station DWI - Denial of Within Grade Increase EMP - At Employees Request EXC - Exception to RIF Release FEG - FEGLI Change FLB - Elected Full Living Benefits FTI – From FT to Intermittent FUL - From Part-Time to Full-Time HRS - Change in Hours IFT – From Intermittent to FT IPT – From Intermittent to PT NMC - Name Change NSF – Change/Correct Non-SF-50 Element NTE - Continuance NTE OTH – Other PAR - From Full-Time to Part-Time PLB - Elected Partial Living Benefits PTI – From PT to Intermittent RET - Change in Retirement Plan SCD - Change in SCD STC - Status Change TEN - Change in Tenure Group VET - Change in Veterans Preference	750 - Continuance NTE 755 - Exception to RIF Release 780 - Name Change From 781 - Change in Work Schedule 782 - Change in Hours 792 - Change in Duty Station 800 - Change in Data Element 803 - Change in Retirement Plan 805 - Elected Full Living Benefits 806 - Elected Partial Living Benefits 880 - Change in Tenure Group 881 - FEGLI Change 882 - Change in SCD 883 - Change in Vet Preference for RIF 888 - Denial of WGI 904 – Change Fund Type/B&R Code 927 – Change in Sub-Agency 928 - Change in Sub-Agency & Org Name 929 - Change in Organization Name 933 - Change in Title 966 - Change/Correct Non-SF-50 Element
EXT	Extension of NTE Date	CON - Conversion to Appt NTE EAN - Extension of Appt NTE EEA - Conversion to Exc Appt NTE	515 - Conversion to Appt NTE 571 - Conv to Excepted Appt NTE 760 - Extension of Appt NTE

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		EFN - Extension of Furlough NTE ELP - Extension of LWOP NTE EPC - Extension of Position Change NTE EPN - Extension of Promotion NTE ESE - Extension of SES Limited Appt NTE ETA - Ext of Term Appt NTE EXT - Extension of NTE Date SLG - Assignment to State/Local Gov.	762 - Extension of SES Limited Appt NTE 765 – Ext of Term Appt NTE 769 - Extension of Prom NTE 770 - Extension of Position Change NTE 772 - Extension of Furlough NTE 773 - Extension of LWOP NTE
HIR	Hire	ADM – Administrative Accession BRO - Brought into Competitive Service CMP - Competitive Appointment DEM - Change to Lower Grade ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Order Appointment FNA - Foreign National Appointment IPA - Intergovernmental Personnel Act LAT – Lateral MIL – Military NPS - New Position OVS - Overseas Limited Appointment PRO – Promotion RES - Reinstatement Appointment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C, Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN – Trainee VOL - Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency ZCL – Change to Lower Grade – CAO ZCV – Conversion to – Appt - CAO ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 – Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 – SES Noncareer Appt 147 – Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administration Accession
LOA	Leave Without Pay	EDU – Education FML - Family and Medical Leave Act HEA - Health Reasons MAT - Maternity/Paternity MIL - Military Service OTH – Other PTD - Partial/Total Disability	430 - Placement in NonPay Status 460 - LWOP NTE 473 - LWOP - US 480 - Sabbatical NTE

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		REL - Relocation SAB - Sabbatical NTE SEA – Seasonal SLG - Assignment to State/Local Gov. USH - Unpaid Statutory Holiday	
LOF	Furlough	FUR - Furlough/Furlough NTE RED - Staff Reduction SEA - Seasonal Closure	471 – Furlough 472 - Furlough NTE
LTO	Long Term Disability	LTO - Long Term Disability	460 - LWOP NTE
PAY	Pay Rate Change	ADJ - Adjustment ALD - Change in Allowance/Differential AUO – Begin AUO AUT – Terminate AUO AVP - Availability Pay COL - Cost-of-Living GMW - GM WGI MER - Merit OTH - Other QSI - Quality Step Increase SPG - Step Progression TGR - Termination of Grade Retention WGI - Within Grade Increase	810 - Change in Allowance/Differential 818 – AUO 819 - Availability Pay 850 - MD/DDS Special Pay 855 - Head Nurse Pay 866 - Termination of Grade Retention 867 - Interim WGI 868 - Termination of Interim WGI 891 - GM WGI 892 - Quality Inc 893 – WGI 894 - Pay Adj 895 - Locality Payment 899 - Step Adjustment
PLA	Leave With Pay	PDR – Pending Disability Retirement PTD – Partial/Total Disability SEA – Seasonal	480 – Sabbatical NTE
POS	Position Change	CAO - Position Change – CAO COC - Change in Occupational Code CON – Change in Org Name CSA – Change in Sub-Agency CSO – Change Sub-Agency & Org Name CSV – Change in supervisor EMP - Employee Request FPP – Failed Probationary Period ILR – In Lieu of RIF INA - Position Inactivated JRC – Job Re-Classification NCS - Issuance of New Class Standard NEW - New Position OTH - Other PRO – Promotion REA – Realignment RED – Reorganization REL – Realignment - CAO RIF – Resulting from RIF RSG – Reassignment STA - Position Status Change TTL – Title Change UPD – Position Data Update XFR – Transfer	500 - Conversion to Career Appt 721 – Reassignment 740- Position Change 790 – Realignment 933 – Change in Title
PRO	Promotion	CAO – Promotion - CAO CMP - Competitive Promotion CNT - Conversion to Appointment NTE CNV - Conversion – CAO CPT - Conversion to Appointment ECM - Exception to Competition ECR - Exception to Competition in Lieu of RIF EXC - Promotion Excepted Service FAI – Failure to Receive Proper Consideration NCP - Normal Career Progression NTE - Promotion NTE OTH - Other	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt - PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt - Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career-Cond 542 - Conv to SES Career Appt

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		RFR – Reclassification RPR - Re-Promotion (Exception to Comp) RTL - Removal of Time Limitation UPG – Upgrade	543 - Conv to Reins-SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt 549 - Conv to SES Ltd Emergency 570 - Conv to Exe Appt 571 - Conv to Exe Appt NTE 590 - Conv to Provisional Appt NTE 702 - Promotion 703 - Promotion NTE
REC	Return from Suspension/Furlough	RTD - Return to Duty	292 - Return to Duty
REH	Rehire	CMP - Competitive Appointment ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Level Appointment FNA - Foreign National Appointment IPA – Intergovernmental Personnel Act MIL - Military OVS - Overseas Limited Appointment RES - Reinstatement/Reemployment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C Appointment SES – Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN - Trainee VOL - Volunteer Appointment VRA - VRA Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 - SES Noncareer Appt 147 - Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administrative Accession
RET	Retirement	DIS – Disability ERT - Early Retirement (Special Option) ILI – Retired - ILIA Adverse Action	300 - Retirement - Mandatory 301 - Retirement - Disability 302 - Retirement - Voluntary

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
		MAN - Mandatory RET - Retired RVL - Retired - Voluntary	303 - Retirement - Special Option 304 - Retirement - ILIA
RFL	Return from LWOP	RFL - Return from LWOP	280 - Placement in Pay Status 292 - Return to Duty 293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC - Disciplinary Action DSB - Disorderly Behavior ILA – Illegal Action IND - Suspension – Indefinite NTE - Suspension NTE	450 - Suspension NTE 452 - Suspension - Indefinite
TER	Termination	ADM – Administration Separation ATT – Attendance CHI – Child/House Care CON – Misconduct DEA – Death DIS – Dishonesty DPP – During Probationary/Trial Period DSC – Discharge EES – Dissatisfied w/Fellow Employee ELI – Elimination of Position EXP – Expiration of Appointment FAM – Family Reasons HEA – Health Reasons HRS – Dissatisfied with Hours ILL – Illness in Family INS – Insubordination JOB – Job Abandonment LOC – Dissatisfied with Location LOW – Lack of Work/Funds LVE – Failure to Return from Leave MAR – Marriage MIS – Misstatement on Application MSP – Directed by MSPB MUT – Mutual Consent OTH – Other OTP – Resignation - Other Position PAY – Dissatisfied with Pay PER – Personal Reasons POL – Dissatisfied w/Comp. Policies PRM – Dissatisfied w/Promotion Opps PTD – Partial/Total Disability RAT - Retired from Affiliate RED – Staff Reduction REF – Refused Transfer REL – Relocation RES – Resignation RET – Return to School RIL – Resignation – ILIA RLS – Release RMV – Removal SEC – National Security SUP – Dissatisfied with Supervision TAR – Tardiness TRA – Transportation Problems TYP – Dissatisfied with Type of Work UNS – Unsatisfactory Performance VIO – Violation of Rules VSP – Voluntary Separation Program WOR – Dissatisfied with Work Conditions XFR – Transfer – To Agency ZCL – Change to Lower Grade – CAO	312 - Resignation – ILIA 317 - Resignation 330 - Removal 350 - Death 351 – Termination - Sponsor Relocating 352 – Termination Appt in 353 – Separation - US 355 – Termination - Exp of Appt 356 – Separation - RIF 357 – Termination 385 – Term during prob/trial period 390 – Separation - Appt in 500 – Conv to Career Appt 501 – Conv to Career-Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Term Appt NTE 512 – Conv to Term Appt – PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt NTE 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 903 – Administration Separation

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
		ZCV – Conv to Appt – CAO ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO CRM - Competitive Reassignment CTA - Conv to Appointment EER - Employee Request EXC - Exception to Competition FPP – Failed Managerial/Supervisory Period ILR – In Lieu of RIF MRR - Manager Request MSP - MSPB Decision NCS - Issuance of New Classification Standards OMB - Resulting from OMB Circular A-76 PRO - Promotion PSC - Position Change - CAO PSN - Position Change RCA - Reassignment - CAO RCL - Resulting from Reclassification REA - Realignment RIF – RIF RLC - Realignment - CAO ROR - Reorganization ROT - Reassignment (Other) RPL - Resulting from RPL, CTAP, ICTAP SES – Senior Executive Service Appt VRA - VRA Appointment	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt – PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt-Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career-Cond 542 - Conv to SES Career Appt 543 - Conv to Reins-SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt 549 - Conv to SES Ltd Emergency 570 - Conv to Exc Appt 571 - Conv to Exc Appt NTE 590 - Conv to Provisional Appt NTE 721 – Reassignment 740 - Position Change 741 - Position Change NTE 790 – Realignment

6.2 Earnings Code - (Retention Allowance, Supervisory Differential, Administratively Uncontrollable Overtime, Availability Pay, Staffing Differential, etc.)

NOTE: This action should always be a separate action and never be combined with a promotion or reassignment, if a new allowance/differential or change in percent or amount is being applied.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
1. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
2. Select **Action**.
3. Select **Reason Code**.
4. Enter the **NOA Code**.
5. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.
2. For NOA Code 818, **Do Not** use remark P81.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Compensation

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row in the **Earnings Code** field.
2. If terminating, place cursor in the **Earnings Code** field and delete each row by using (-).
3. Verify salary information.

🗀Employment 1

1. Enter **Pay Chg Dt** if this action resulted in any change in the employees' pay either negative or positive.
2. DO NOT change **LEI Date**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save.

6.3 Change to Lower Grade

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on “Modifying Position” under “Position Information”.
B. If the Position does not exist, refer to the section on “Creating a Position” under “Position Information”.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**. The **Step Entry Date** and **Grade Entry Date** defaults to reflect the effective date of the action.
3. If employee is on retained grade or pay, enter applicable information.

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. If more than one earnings code is required, insert a row in the **Earnings Code** field.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

🗀Employment 1

1. Enter LEO SCD if applicable.
2. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
3. Review/Change **LEI Date**.

🗀Employment 2

1. Review/Change/Enter **Retained Grade Expires** dates as appropriate. **<u>NOTE</u>: Retained Grade Expiry Date** should be entered one day less than the **Retained Grade Begin Date**. *Ex: Retained Grade Begin Date is 12-12-1998, then Retained Grade Expiry Date should be 12-11-2000.*
2. Review/Change **Permanent Data RIF**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

<u>NOTE:</u> *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

6.4 Locality Pay

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Compensation

1. Delete the **Step** and tab.
2. Re-enter the **Step** and tab.
3. Verify **Locality Payment**.
4. Enter base pay if employee's **Step** is "00".

🗀Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save.

6.5 Bonus - (Separation Incentive, Relocation, Recruitment and Referral Bonus)

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Award Data

1. Enter **Award Amount**.
2. <u>DO NOT</u> enter or change **Account Code**.

Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

6.6 Pay Adjustment

NOTE: *If this Pay Adjustment requires a change to the employee's pay plan or grade, which is on rare occasion, the employee's position must reflect that change, i.e., from GM to GS pay plan. If not, proceed to Step 2.*

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".
B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information".

Step 2 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ.*
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Job

Important: *If the pay adjustment requires a change to the pay plan or grade, which is on rare occasion, the following 2 steps* ***must be processed*** *so that the correct position information populates the Job:*

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation - This applies to WB, WG, WL, and WS pay plans also.

1. If you made a change to the position information:
   a) Enter the **Step**.
2. If the position information has not changed:
   a) Delete the **Step** and tab.
   b) Re-enter the **Step** and tab.

   NOTE: If pay plan is WB or AD with a step then you must enter the step as “1”, tab out of the step field and then re-enter the appropriate step.
3. Manually enter the base pay if the employee’s **Step** is "00".
4. Verify salary information.

🗀Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action.
2. If processing this action for an employee with pay plan “AD,” you may enter the **LEI Date** to track scheduled increases.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

6.7 Promotion - (Career Ladder, Competitive, Temporary Promotion NTE)

Important: *Check to see if employee is entitled to a WGI before processing promotion if so, refer to the Section "Multiple Action With Same Effective Date for an Employee"* under *"Basic Operations/Functions.*

Step 1 Create or Modify Position.

A. If you are re-using an old Position, refer to the section on "Modifying Position" under "Position Information".
B. If the Position does not exist, refer to the section on "Creating a Position" under "Position Information".

Step 2 Process Personnel Action.

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date** and **Not to Exceed Date** if appropriate. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Job

1. Delete the **Position**.
2. Tab **-** this will remove prior position information.
3. Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
4. Tab **-** this will refresh with new position information.

🗀Compensation

1. Review/Change **Pay Rate Determinant**. It is critical that the PRD is entered before step and/or salary information to set base pay and locality adjustment correctly. If you inadvertently fail to enter the PRD first, enter the appropriate PRD, delete step and tab, then re-enter step and verify salary information.
2. Enter **Step**, if applicable.
3. Verify **Step Entry Date** and **Grade Entry Date**.
   NOTE: The **Grade Entry Date** field is system generated and reflects the effective date of the action that changes the employee's grade. (Example: If an employee has been a grade 12 for three years and then receives a temporary promotion to a 13, the temporary promotion action should reflect the date that he/she was promoted to the 13. Once a change to lower grade action is processed, the field should reflect the date that the employee was brought back to the grade 12, not the original date that he/she was promoted to the grade 12.)

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate. Based on selection of **Earnings Code**, you may be required to enter the **Pay Period Amount**. Insert a row in the **Earnings Code** field if more than one **Earnings Code** is required.

Accounting Info

1. Review/Change Appropriation Code in the **Account** field.

🗀Employment 1

NOTE: If the promotion being processed is to make a Temporary Promotion permanent you must manually enter the **Pay Chg Dt** and **LEI** using the effective date of the Temporary Promotion.

1. Enter LEO SCD if applicable.
2. The **Pay Chg Dt** will autopopulate with the effective date of the action unless the Base Pay and Locality/LEO Adjustment does not equal the corresponding fields on the prior non-canceled row.
3. The **LEI Date** will autopopulate with the effective date of the action.

Exp Dates

1. If processing a Temporary Promotion, enter **Temporary Promotion** date.

🗀Employment 2

1. Enter appropriate **Probation Dates: Probation Date, SES Probation, Supv/Manager Probation**. These dates should be completion dates of probation periods. Enter date completed if probationary period has already been served. Leave blank if not subject to a probationary period.
2. Enter **Retained Grade Expires** dates as appropriate.
3. Enter **Permanent Data RIF -** this should not change if promotion is temporary, however if the temporary promotion is made permanent, this data must be changed on this action.

4. Review other data and change as necessary. **Last Promotion Date** autopopulates with effective date of action. If a temporary promotion is made permanent, this date must be changed to reflect the effective date of the temporary promotion.

Security Info

1. Review/Change **Security Clearance**, **Status,** and **Status Dt**.
2. Indicate if a **Financial Disclosure** is required.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

6.8 Extension of Promotion NTE

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Enter **Not to Exceed Date**.
5. Select **Action**.
6. Select **Reason Code**.
7. Enter the **NOA Code**.
8. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Compensation

⇨ ***NOTE:*** The **Grade Entry Date** field is system generated and reflects the effective date of the action that changes the employee's grade. (Example: If an employee has been a grade 12 for three years and then receives a temporary promotion to a 13, the temporary promotion action should reflect the date that he/she was promoted to the 13. Once a change to lower grade action is processed, the field should reflect the date that the employee was brought back to the grade 12, not the original date that he/she was promoted to the grade 12.)

🗀Employment 1

Exp Dates

1. **Not to Exceed Date** will automatically update when action is saved.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

6.9 Award - (Individual/Group Cash, Invention, Suggestion, Time Off, Travel Savings Incentive, etc.)

***NOTE*:** If an award needs to be processed for an employee who has been reassigned (or promoted) to a different office than the one granting the award, the HR office processing the award must coordinate the personnel action with the employee's current HR office. Awards are charged to the employee's current organization; therefore, if the award was granted by the employee's former organization, the former organization must reimburse the current organization for the award amount paid to the employee. When mass award actions are processed by the CHRIS staff, both the current and former HR office will be notified that coordination of the award payment will be needed.

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter **Authority#1 and/or Authority #2** for NOA Code 878, SES Rank Award, or 879, SES Performance Award Only; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Award Data

1. Enter **Award Amount** or **Hours** as required.
2. Enter appropriate identifier (case number) in **Group/Individual Award** field is available for optional use. This is not a required field. The value of *"0000"* identifies an individual award. The group award number should be greater than *"0000"* and is assigned by each office maintaining its own numbering system for group awards.
3. DO NOT enter or change the **Account Code**.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

6.10 Quality Increase

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Compensation

1. Enter the **Step** and the **Step Entry Date** will default to reflect the effective date of the action
2. If Pay Plan is "GM" the base pay will automatically calculate the new salary. **DO NOT CHANGE BASE PAY FOR THE EMPLOYEES.**

Employment 1

1. The **Pay Chg Dt** with autopopulate with the effective date of the action.
2. The **LEI Date** will be grayed out (not editable) since a QSI does not change the **LEI Date**.
3. The **WGI Due Date** will recalculate automatically if the QSI changes the WGI waiting period.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

6.11 Within Grade Increase

Important: Review **Non Pay Hours WGI** to determine if WGI should be delayed.

- *The **WGI Non-Pay Hours** currently recorded in CHRIS include **total** non-pay hours during the WGI waiting period, **not** excess hours. The excess hours must be subtracted from the total hours in determining the correct effective date for the WGI. **Non-pay Hours** for a particular pay period are not posted in CHRIS until Friday following pay calculation for that pay period. Therefore, it is recommended that you process WGI's in the **second week of the pay period** following the effective date to ensure that effective dates are set correctly for employees who have non-pay hours during the waiting period. To view the WGI Non Pay Hours panel for verification of non pay hours:*

  Administer Workforce > Administer Workforce (USF) > Use > WGI Non Pay Hours

  If an employee had any applicable NonPay hours prior to the implementation of CHRIS, the beginning row dated 9/26/1998 will show the cumulative carryover amount from the legacy system PAY/PERS.

  It is recommended that after generating the WGI Tickler Report each pay period, to review these pages for any employee who has a balance of NonPay Hours. These pages will help determine the amount of hours used during the required waiting period and also determine whether or not the employee is entitled to the WGI. It is important to remember that the hours reflected on the WGI Tickler Report are the TOTAL AMOUNT of nonpay hours and **not excess** of allowable hours for the WGI waiting period.

- *If the employee entitled to a WGI with a Pay Plan of GM and a Pay Rate Determinant of "M", it will be necessary to contact the CHRIS Functional Hotline for assistance in processing the WGI.*

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ.*
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (**-**) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. This date must be on or before the effective date of the action. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter the required approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Compensation

1. Enter the **Step** and the **Step Entry Date** will default to reflect the effective date of the action. <u>**NOTE**</u>*: For a GM-13/14/15 employee, use the 891* ***NOA Code****, and the base pay will autocalculate--* <u>***DO NOT***</u> *enter the base pay manually. The new base pay will autopopulate with the maximum amount for the grade if the calculation would otherwise have exceeded the step 10 rate for the grade*.
2. **Locality/LEO Adjustment** and **Total Pay** will then be calculated automatically based on the new base salary. There will be no change to the **Step Entry Date**.

Other Pay Information

1. Review/Change/Enter **Earnings Code** if appropriate.
2. Review/Change **Pay Period Amount** if appropriate.

Employment 1

1. The **Pay Chg Dt** will autopopulate with the effective date of the action.
2. The **LEI Date** will autopopulate with the effective date of the action.
3. The **WGI Due Dt** and **WGI Status** will autopopulate based on the **LEI, Pay Plan, Pay Rate Determinant,** and **Tenure**.
4. **WGI Override** will automatically change from “Manual” to “Auto” if employee’s record previously was changed to “Manual.”

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

7 Separation Actions

Contents

7.1 CHRIS Action/Reason Code and Nature of Action Crosswalk – Separation Actions

Action Code	*Action Description*	*Action/Reason Code*	*Nature of Action/Codes*
RET	Retirement	DIS - Disability ERT - Early Retirement (Special Option) ILI - Retired - ILIA Adverse Action MAN - Mandatory RET - Retired RVL - Retired - Voluntary	300 - Retirement - Mandatory 301 - Retirement - Disability 302 - Retirement - Voluntary 303 - Retirement - Special Option 304 - Retirement - ILIA
TER	Termination	ADM – Administration Separation ATT – Attendance CHI – Child/House Care CON – Misconduct DEA – Death DIS – Dishonesty DPP – During Probationary/Trial Period DSC – Discharge EES – Dissatisfied w/Fellow Employee ELI – Elimination of Position EXP – Expiration of Appointment FAM – Family Reasons HEA – Health Reasons HRS – Dissatisfied with Hours ILL – Illness in Family INS – Insubordination JOB – Job Abandonment LOC – Dissatisfied with Location LOW – Lack of Work/Funds LVE – Failure to Return from Leave MAR – Marriage MIS – Misstatement on Application MSP – Directed by MSPB MUT – Mutual Consent OTH – Other OTP – Resignation - Other Position PAY – Dissatisfied with Pay PER – Personal Reasons POL – Dissatisfied w/Comp. Policies PRM – Dissatisfied w/Promotion Opps PTD – Partial/Total Disability RAT – Retired from Affiliate RED – Staff Reduction REF – Refused Transfer REL – Relocation RES – Resignation RET – Return to School RIL – Resignation – ILIA RLS – Release RMV – Removal SEC – National Security SUP – Dissatisfied with Supervision TAR – Tardiness TRA – Transportation Problems TYP – Dissatisfied with Type of Work UNS – Unsatisfactory Performance VIO – Violation of Rules VSP – Voluntary Separation Program WOR – Dissatisfied with Work Conditions XFR – Transfer – To Agency	312 - Resignation – ILIA 317 - Resignation 330 - Removal 350 - Death 351 – Termination - Sponsor Relocating 352 – Termination Appt in 353 – Separation - US 355 – Termination - Exp of Appt 356 – Separation - RIF 357 – Termination 385 – Term during prob/trial period 390 – Separation - Appt in 500 – Conv to Career Appt 501 – Conv to Career-Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Term Appt NTE 512 – Conv to Term Appt – PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt 549 – Conv to SES Ltd Emergency 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt NTE 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 903 – Administration Separation

Action Code	***Action Description***	***Action/Reason Code***	***Nature of Action/Codes***
		ZCL – Change to Lower Grade – CAO ZCV – Conv to Appt – CAO ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	

7.2 Resignation

NOTE: *If this Separation involves Voluntary Separation Pay, you must also process a Bonus for the amount. See "Processing a Bonus" under section entitled "Pay Change Action".*

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press **-** to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   c) Check the **Override Operator Emplid** box.
   d) Enter approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Personal Data

1. To change **Address Information**, refer to section *"Change of Address"* under *"Basic Operations/Functions.*

🗀Employment 1

1. **Separation Dt** will default to reflect the effective date of the action.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on Correct History
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change PAR Status to PRO.
4. Save

<u>NOTE:</u> *Once an old position becomes vacant, follow the procedure under "Position Information" tab to inactivate it.*

7.3 Retirement

NOTE: *If Retirement entitles employee to Separation Incentive Pay, you must **first** process the Bonus action. See "Processing a Bonus", under section entitled "Pay Change Actions".*

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority #1 and/or Authority #2**: if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   e) Check the **Override Operator Emplid** box.
   f) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

🗀Personal Data

1. To change **Address Information**, refer to section *"Change of Address"* under *"Basic Operations/Functions*.

🗀Employment 1

1. **Separation Dt** will default to reflect the effective date of the action.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (-) or change **PAR Status** to **PRO**.
4. Save

__NOTE:__ *Once an old position becomes vacant, follow the procedure under "Position Information" tab to inactivate it.*

7.4 Separation - (RIF, Removal, Termination)

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

🗀Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ.*
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.
7. Enter **Authority#1 and/or Authority #2**; if the authority requires inserts, enter them within the space provided to the right of the **Authority Code** field or as part of the actual **Authority Code** text.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

Severance Pay

1. If applicable, change **Severance Status** to active.
2. Enter the **Severance Pay** and **Severance Weekly Amounts**.

🗀Personal Data

1. To change **Address Information**, refer to section *"Change of Address"* under *"Basic Operations/Functions.*

🗀 Job

1. If this action is a Termination Appt-In, you must enter the appropriate 2-digit agency code in the **To Agency** field.

🗀Employment 1

1. Review **Separation Dt**; it will reflect the effective date of the action.

🗀Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (**-**), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

<u>NOTE:</u> *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

7.5 Death

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Request Action

Data Control

1. Select Employee.
2. **Insert** a row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action**.
5. Select **Reason Code**.
6. Enter the **NOA Code**.

PAR Remarks

1. Enter remark code in **Remark CD** field. Press (+) to insert additional remarks. Press (-) to delete unnecessary remarks. Use the < or > arrows to view remarks.

Tracking Data

Action Taken date defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. To change (if necessary):
   a) Check the **Action Dt Ovrd** box.
   b) Change **Action Taken date**.
   c) Uncheck the **Action Dt Ovrd** box.

1. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter approving official in the **Emplid of Tracking Row** field. <u>DO NOT</u> uncheck **Override Operator Emplid** box.

Employment 1

1. **Separation Dt** will default to reflect the effective date of the action.

Return to Data Control

1. Save.
2. Print SF-52 and review for accuracy.
3. If corrections are necessary or if the action needs to be deleted (-), do so now. If the action is valid, and you are authorized to change **PAR Status** to *PRO* immediately, change the **PAR Status** field to *PRO* and Save.
4. If you leave the page, before corrections, deletion, or change to "PRO" **PAR Status**, you must re-enter the page in **Correct History** using the following path:

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Click on **Correct History**
2. Select Employee.
3. Make necessary corrections, delete row (**-**) or change **PAR Status** to **PRO**.
4. Save

NOTE: *Once old position becomes vacant, follow procedure under "Position Information" tab to inactivate it.*

7.6 Processing Actions For Separated Employees

NOTE: ***Administrative Accessions should only be used to establish a record in CHRIS for a separated employee who has not previously held a record in CHRIS.***

Occasionally it is necessary to process an action or correct erroneous data for a separated employee. Examples are:

- A separated employee receives an award.
- An employee who separates to accept a position with an international organization elects to retain Federal benefits such as retirement, FEGLI, and FEHB during the international assignment. Pay actions such as within-grade increases and pay adjustments for which the IAEA employee becomes eligible must be processed to allow for correct billing of benefits.
- A separated employee has erroneous data such as a retirement code that was wrong in the legacy system and now needs to be corrected for payroll and retirement record purposes.

If the employee holds a record in CHRIS, follow standard processing procedures to process the action(s) or correction(s). In this case, do **not** process an Administrative Accession or Administrative Separation.

The following procedures will be used when it is necessary to access an employee into the CHRIS system, process one or more actions, and return the employee to "Terminated" status.

- Gather data needed for the Administrative Accession. This information will come from a variety of sources such as the SF-7, OPF, payroll records, information from other Federal agencies, etc.
- Select the effective date for the action. Examples are:
  - You must process an Administrative Accession (NOA Code 997), a Within-Grade Increase (NOA Code 893), and an Administrative Separation (NOA Code 903) **all effective 03/01/98.** It is essential that these steps be followed exactly because of the impact on the payroll interface. ***The actions must be entered sequentially and all three actions must be entered on the same day.***
  - You must process an Administrative Accession (NOA Code 997) to correct erroneous data such as the retirement code and then process an Administrative Separation (NOA Code 903) to change the employee to "Terminated" status. If the employee separated between 03/01/98 and 09/26/98, and for some reason the employee does not have a record in CHRIS, use the date of separation as the effective date for both actions. Otherwise, you will use 03/01/98 as the effective date for both actions as this is a key date for the PAYS interface. If you use a date prior to 03/01/98, the information will not be picked up on the PAYS interface. Note: Most employees who separated on or after 12/01/97 will already be in the CHRIS database.
  - Request new job codes, if needed.
  - Determine if the Department ID (organization code) from which the employee was separated is in CHRIS. If not, it will be necessary to select a related organization code that is valid in CHRIS as of the effective date of your Administration Accession.

STEP 1

Administer Workforce > Administer Workforce (USF) > Use > Request Action

1. Select separated employee.
2. **Insert** a Row (+).
3. Enter the **Actual Effective Date**. **PAR Status** defaults to *REQ*.
4. Select **Action** – *Hire*.
5. Select **Reason Code -** *Administrative Accession*.

6. Enter the **NOA Code -** 997 *Administrative Accession*.
7. Save.

STEP 2 - **(<u>For Pay and Award Actions Only</u>)**

1. **Insert** a Row (+).
2. Follow the directions for the WGI, Pay Adjustment or Award.
3. Use the ***same effective date*** as the Hire action.
4. Save.

STEP 3 - **<u>Also used to transfer employees to BPA (Bonneville Power Admin) or FERC (Federal Energy Regulatory Commission)</u>**

1. Select separated employee.
2. **Insert** a Row.
3. Enter the **Actual Effective Date** (same as the Hire action).
4. Select **Action –** *Termination*.
5. Select **Reason Code -** *Administrative Separation*.
6. Enter the **NOA Code -** 903 *Administrative Separation*.
7. Save.

8 Correction & Cancellation Actions

Contents

8.1 Correction

NOTE: **THIS PROCEDURE SHOULD NOT BE USED TO CORRECT NOA Code 9XX Actions (i.e. 966, 904).** *Corrections can only be processed on actions in PRO PAR Status. This procedure is used to correct SF-50 data elements only. Corrections can only be processed on items previously entered in CHRIS. To change historical actions (not processed in the CHRIS database) see section 12 Web Applications.*

If this correction involves changes in Position Data such as: ***Grade, Title, Series, Location, Department, Work Schedule, Position Occupied, Standard Hours, Bargaining Unit, etc.*** *you must refer to the section on "Modifying a Position" under "General Procedures".*

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (USF) > Use > Correction

🗀Data Control

1. Select Employee.
2. Scroll to the action you want to correct; verify the **Effective Date**.
3. Insert a row (+).
4. **PAR Status** defaults to *COR*.

PAR Remarks

1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
2. Use the < or > arrows to view **Remarks**.
3. If necessary, delete old remarks, and then enter appropriate remarks for the correction.
4. Be sure to include a remark stating what has been corrected.

Tracking Data

1. **Action Taken date** defaults to system date. The **Action Taken date** appears in block 49 of the SF-50. **DO NOT CHANGE THIS DATE.**
2. The **Emplid of Tracking Row** defaults to the PAR approving official for your sub-agency. The **Emplid of Tracking Row** appears in block 50 of the SF-50. To change (if necessary):
   a) Check the **Override Operator Emplid** box.
   b) Enter approving official in the **Emplid of Tracking Row** field. DO NOT uncheck **Override Operator Emplid** box.

🗀Job- Any *changes that affect position must be made in Manage Positions first.*

1. If changes were made under Manage Positions:
   a) Delete the **Position**.
   b) Tab **-** this will remove prior position information.
   c) Enter the **Position** (**Job Code, Agency, Sub-Agency, Department,** and **Location** will default from Position Data.)
   d) Tab **-** this will refresh with new position information.

🗀Compensation

1. Enter **Step** if this Correction affects position data.

🗀Employment 1

1. Change necessary data fields. See information on "*Using SCD Calculator*" under "*Basic Operations/Functions*."

🗀Employment 2

1. Change necessary data fields.

🗀Return to Data Control

1. Save **-** Read the message. You must review records effected by changes and check the Review Performed Flag before saving.
2. If you are correcting an action that is ***not*** the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
3. Use the right-hand scroll bar to review subsequent actions. On each record you must check the Review check box in the upper right hand corner before saving. See section entitled "*Understanding Reviewed Flag*" under "*Basic Operations/Functions*" for an explanation of **Reviewed Flag**.
4. Scroll back to the Correction Action.
5. Save.

NOTE: *In some cases you can either correct the most recent action using a remark that corrects prior SF-50's or may be necessary to correct each subsequent action by processing a NOA Code "002" or "966" unless the actions are awards or NOA Code "900". The award and NOA Code "900" actions can be refreshed by contacting the CHRIS Functional Hotline.*

8.2 Cancellation

A NOA Code 001 should <u>never</u> be processed to cancel a NOA Code 002 or any 9XX actions.

<u>This action is used to rescind an earlier action that was improper, that was proper but contained references to an improper action, or that contains remarks that are inappropriate or erroneous and that should not have been recorded.</u>

<u>NOTE</u>: *This process should only be used for an official NOA Code 001 Cancellation PAR action.*

> *If employee's record only has <u>one</u> action (single row) of data, you must <u>first</u> insert a row and enter the appropriate action, then process the cancellation for the incorrect/unnecessary action.*
>
> *If the cancellation effects <u>position data</u> you will need to delete the appropriate rows of position information that was created/modified for the action being canceled.*

Step 1 Process Personnel Action

Administer Workforce > Administer Workforce (UDF) > Use > Cancellation

Data Control

1. Select Employee.
2. Select appropriate action and verify **Effective Date**.
3. You can ***NEVER*** insert a row on a canceled row.
4. Click on **PAR Status** and change to **CAN**.
5. If you are canceling an action that is ***not*** the most recent action, a message will direct you to review records affected by the changes and check the **Review Performed Flag** on the Data Control Page before you save the action.
6. Save.

PAR Remarks

1. Press (+) to insert **Remarks** or (-) to delete **Remarks**.
2. Use the < or > arrows to view **Remarks**.
3. If necessary, delete old remarks, and then enter appropriate remarks for the correction.

<u>NOTE</u>: *If this is not the most recent action being canceled, you will need to cancel/correct each subsequent action.*

8.3 Settlement Agreements And Court Orders

CHRIS users are urged to review these procedures carefully. Since many of these situations require the processing of multiple retroactive personnel actions, this processing activity must be planned carefully in close coordination with CHRIS, Payroll, and DOEInfo staff members. The CHRIS user assigned responsibility for effecting the settlement agreement and/or court order must work closely with the CHRIS Functional Hotline staff to prepare and correct the employment history, the Payroll Office to reconstruct the retirement card, and the DOEInfo staff to purge any actions that will be obsolete. Users are urged to initiate an early conference call initially with CHRIS Functional Hotline to discuss the terms of the agreement or court order that must be implemented. Subsequent discussions will probably be necessary with Payroll and DOEInfo staff members prior to the time that the new actions are affected in CHRIS.

Background

Certain settlement agreements, decisions, and court orders require the correction or cancellation of previously issued actions and processing of replacement actions and/or newly-required actions to make the employee “whole” According to the Guide for Processing Personnel Actions, agencies are required to change the employee’s record in their service record system, making sure to delete all actions or items referring to a canceled action. DOEInfo is the corporate repository system which maintains the service record history information, SF-7.

In addition to the Official Personnel File (OPF) reflecting the reconstructed record and the service record containing no references to any canceled actions, the settlement agreement or decision may stipulate that all references to negative, adverse, or erroneous information be removed from all automated or electronic files. For DOE, the electronic records are maintained within the Corporate Human Resource Information System (CHRIS) which is used to process personnel actions and update DOEInfo.

Procedure

This procedure addresses how the service record system will be reconstructed and the manner in which electronic records will be expunged if the decision states that this is required.

1. Upon notification by the HR office that an employee’s personnel record must be reconstructed and the electronic records must be purged due to a settlement agreement or court order, the CHRIS user will identify what actions need to be canceled, corrected, and replaced or are newly required.
2. The CHRIS user will print the SF-7 card and annotate the document with the types of actions that need to be removed, inserted, or corrected.
3. The CHRIS user will fax the annotated SF-7 record to the CHRIS Functional Hotline at (304) 285-4553 for evaluation as to how the actions should be processed in CHRIS.
4. The CHRIS Functional Hotline staff will review the document to determine:

   - how far back the employee’s history must be reconstructed.
   - if all the actions can be done within CHRIS.
   - what actions the user can process within the system.
   - what actions the CHRIS staff will need to enter in the system.
   - if job codes and table modifications (e.g., department table) are needed to accommodate the historical actions.
   - what actions need to be deleted from the system <u>after</u> the record is reconstructed.

5. The CHRIS staff will contact the user to discuss the steps needed and advise of any intervention needed.

6. All actions to effect a settlement agreement or court order should be processed in a single pay period, preferably in as compressed a time frame as possible. The user should notify the CHRIS Functional Hotline in advance of when he/she plans to affect these actions. Generally, processing (both position and employee changes) should begin immediately following a pay calculation run to give the user ample time within a single pay period to complete all actions. Any new job codes that may be needed may be requested prior to the pay period in which the processing will occur.

7. As needed, the user will contact the CHRIS Functional Hotline for assistance in processing the actions. The CHRIS staff will work jointly with the user on those actions or table updates that need to be done by the hotline staff.

8. The user will check DOEInfo the next day to verify if the actions have been updated in the repository and will notify the Hotline when the actions are completed.

9. The CHRIS Hotline will delete the actions (rows) for all cancellation, correction, and original actions that contain references to the erroneous actions as specifically required by the settlement agreement. The actions will be deleted **only after** the transactions have been reported to OPM on the next CPDF Dynamic report. Upon completion, the Hotline staff will notify the user in writing that the actions in CHRIS were purged.

10. After processing the settlement agreement or court ordered actions, the user will obtain a copy of the most recent SF-7 record and annotate the document with those actions that need to be removed or added on retirement record card, SF-2806. If CHRIS could not be reconstructed to accurately reflect the employee's service history due to the age of the actions, the user will manually prepare any SF-50s.

11. The user will forward a note to CR-55, along with a copy of the annotated SF-7 card and the SF-50s, requesting reconstruction of the retirement record card. Send the request to:

    Payroll Division, CR-55
    Department of Energy
    19901 Germantown Road
    Germantown, MD 20874

12. If the settlement agreement or court order stipulates that historical electronic records are required to be expunged of the erroneous actions, provide a copy of the annotated SF-7 card to:

    Frank Casaleno
    Department of Energy, SO-4
    19901 Germantown Road
    Germantown, MD 20874

9 CHRIS Reporting

Contents

9.1 Corporate Reports

Reports Available From Manage Human Resources/ DOE Reports

PAR Remarks	This report will generate a listing of PAR Remarks sorted by Remark Code.
Accession by Bargaining Unit	This report runs using specified “from/to” dates so that a biweekly report can be generated based on the designated BUS Code and sub-agency.
Alpha List of Active Employees	This report will create an alphabetical list of employees within your subagency.
Awards Report	This report runs using “from/to” dates based on the designated sub-agency for “any” employee who has an award-related NOA processed such as 872, 874 through 879, 885, and 892. The user will have the capability to select the desired NOA Code's from a drop down list. It will also indicate the employee's status.
Bargaining Unit Employees	This report runs using an “as of” date to obtain a snapshot of employees based on the designated BUS Code and sub-agency.
Organization (Profile) Report	This report will create an organizational list of employees within your sub-agency.
Service Awards	This report will generate a list of employees eligible for a service award.
SSN List of Active Employees	This report will create a list of active employees by Social Security Number.
User Workload Report	This report will generate a count of actions processed by NOA Code and Operator ID's with the subagency.
REQ Stat Report	This will generate a listing of actions that are in a PAR Status of REQ.
Terminations by Bargaining Unit	This report runs using specified “from/to” dates so that a biweekly report can be generated based on the designated BUS Code and sub-agency.
Department Managers Report	This report generates a list of the Department Table with the Manager assigned to each department.
"Reports to" Report	This report generates a list of each employee within their sub-agency and the their supervisor from the position data and employment data record.
"Reports to" Differences	This report generates a list of differences that exist between the employees position data record and the employment data record.

Reports Available From Manage Positions/Reports

Job Code Table Report	This report creates a job code listing for your organization(s).
Official Position Titles Report	This report creates a list of all official position titles used in CHRIS.
Organization Position Titles	This report creates a list of all organization position titles used in CHRIS.
Vacant Position Report	This report creates a list of your vacant positions and information about those positions.

Printing from Adobe Acrobat 5.0

Some reports will require you to modify the “Copies and Adjustments” section on the Print page. This is to control what buttons need to be turned on or off. You may have to open “Properties” and select the proper orientation “Portrait” or “Landscape” or “Shrink oversized pages to paper size”. Once the report appears in the print preview display as you want to see it printed send it to the printer.

How to Establish A Run Control

A Run Control is a set of instructions that you establish for the report you are running. You may establish an unlimited number of run controls, but once established, they cannot be deleted.

1. **Add -** Used to setup/create a completely new **Run Control ID**. Enter a **Run Control ID** (max 30 characters) on the popup window and click OK. If the Run Control already exists, you will get the error message: “Specified record already exists Update?” Press ‘Yes’ to use the Entered **Run Control ID** or ‘No’ to add a new one. On the next screen you will be required to enter the requested information before you will be able to use the new Run Control. You may add additional sub agency information, where appropriate, by hitting the (+) key.

2. **Search -** Used when executing an existing Run Control. Once a **Run Control ID** is setup the same **Run Control ID** can be used every time to run the same report.

Generating A PAR Remarks Report

The **PAR Remarks** report is a list of all **Remark Codes**. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > PAR Remarks

1. Select **PAR Remarks**

2. Click on **Add a New Value**

3. **Run Control ID -** PARRMK

4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "PARRMK"

5. Click on **Save**

6. Click on **Run**

7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT

8. Verify under **Process List** that the **Type**: Web and **Format**: PDF

9. Click **OK**

10. Record the process instance number.

11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**

12. Maximize the **Report/Log Viewer** page.

13. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.

14. Adobe Acrobat will open.

15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

16. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Accessions by Bargaining Unit Report

The **Accessions by Bargaining Unit** will generate based on BUS Code designation. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Accessions by Bargaining Unit

1. Select **Accessions by Bargaining Unit Report**
2. Click on **Add a New Value**
3. **Run Control ID -** ACCBARGUNIT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ACCBARGUNIT"
5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
7. Enter the **BUS Code**. You can enter the four-digit code if you know it or click on the magnifying glass and select from list. To add more than one **BUS Code**, press (+) to add a row for the next **BUS Code**. Follow this process until you have selected each one you wish to report on.
8. Click **Save**
9. Click on **Run**
10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
11. Verify under **Process List** that the **Type**: Web and **Format**: PDF
12. Click **OK**
13. Record the process instance number.
14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
15. Maximize the **Report/Log Viewer** page.
16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
17. Adobe Acrobat will open.

18. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

19. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Terminations by Bargaining Unit Report

The **Terminations by Bargaining Unit** will generate based on BUS Code designation. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Terminations by Bargaining Unit

1. Select **Terminations by Bargaining Unit**
2. Click on **Add a New Value**
3. **Run Control ID -** TERMBARGUNIT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "TERMBARGUNIT"
5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Alpha List Of Active Employees

The **Alpha List of Active Employees** report is used to print a listing of employees who are in an active status. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Alpha List of Active Employees

1. Select **Alpha List of Active Employees**
2. Click on **Add a New Value**
3. **Run Control ID -** ALPHA
4. Click **Add - ** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ALPHA"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A User Workload Report

The **User Workload Report** will generate a count of actions processed by **NOA Code** and Operator ID's within a *Sub-Agency*. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > User Workload Report

1. Select **User Workload Report**
2. Click on **Add a New Value**
3. **Run Control ID -** WORKLOAD
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "WORKLOAD"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Awards Report

The **Awards Report** will generate a list of awards by **NOA Code** for employees within a *Sub-Agency*. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Awards Report

1. Select **Awards Report**

2. Click on **Add a New Value**

3. **Run Control ID -** AWARDS

4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "AWARDS"

18. Enter **From Date** and **Thru Date** for the time period on which you wish to report.

5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.

6. Enter the **NOAC** or **NOAC's** for which you wish to generate the report. You can enter the three-digit code if you know it or click on the magnifying glass and select from the list. To add more than once **NOAC**, press (+) to add a row for the next **NOAC**. Follow this process until you have selected each **NOAC** you wish to report on.

7. Click on **Save**

8. Click on **Run**

9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT

10. Verify under **Process List** that the **Type**: Web and **Format**: PDF

11. Click **OK**

12. Record the process instance number.

13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**

14. Maximize the **Report/Log Viewer** page.

15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.

16. Adobe Acrobat will open.

17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Bargaining Unit Employees Report

The **Bargaining Unit Employees Report** will generate a list of employees by designated **BUS Code**. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Bargaining Unit Employees Report

1. Select **Bargaining Unit Employees Report**
2. Click on **Add a New Value**
3. **Run Control ID -** BARGUNIT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "BARGUNIT"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Enter the **BUS Code**. You can enter the four-digit code if you know it or click on the magnifying glass and select from list. To add more than one **BUS Code**, press (+) to add a row for the next **BUS Code**. Follow this process until you have selected each one you wish to report on.
7. Click on **Save**
8. Click on **Run**
9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
10. Verify under **Process List** that the **Type**: Web and **Format**: PDF
11. Click **OK**
12. Record the process instance number.
13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
14. Maximize the **Report/Log Viewer** page.
15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
16. Adobe Acrobat will open.

17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Organization Report

The **Organization Report** is used to print a listing of employees who are in an active status by organization. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Organization Report

1. Select **Organization Report**
2. Click on **Add a New Value**
3. **Run Control ID -** ORGRPT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ORGRPT"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s)*". Therefore, you must enter or select a **Sub-Agency** or select a specific **Department.**
8. Click on **Save**
9. Click on **Run**
10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
11. Verify under **Process List** that the **Type**: Web and **Format**: PDF
12. Click **OK**
13. Record the process instance number.
14. Click on Report Manager and scroll to the right side of the page and click on Refresh until you see **View** appear next to your report. Click on **View**.

15. Maximize the **Report/Log Viewer** page.

16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.

17. Adobe Acrobat will open.

18. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

19. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Service Awards Report

The **Service Awards** report is used to find employees who have 10, 20, 25, 30, 35, 40, 45, or 50 years of service and are eligible for a service award. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Service Awards Report

1. Select **Service Awards Report**
2. Click on **Add a New Value**
3. **Run Control ID -** SVCAWDS
4. Click **Add - ** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "SVCAWDS"
5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
7. Click on **Save**
8. Click on **Run**
9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
10. Verify under **Process List** that the **Type**: Web and **Format**: PDF
11. Click **OK**
12. Record the process instance number.
13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **<u>View</u>** appear next to your report. Click on **<u>View.</u>**
14. Maximize the **Report/Log Viewer** page.
15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
16. Adobe Acrobat will open.
17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating SSN List of Active Employees

The **SSN List of Active Employees** report is a list of all active employees by Social Security Number (**SSN**). To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > SSN List of Active Employees

1. Select **SSN List of Active Employees**
2. Click on **Add a New Value**
3. **Run Control ID -** SSNRPT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "SSNRPT"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An REQ Stat Report

The **REQ Stat Report** is used to identify personnel actions that are still in *REQ* **PAR Status** for your *Sub-Agency* by *User ID*. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > REQ Stat Report

1. Select **REQ Stat Report**
2. Click on **Add a New Value**
3. **Run Control ID -** REQSTAT
4. Click **Add** **-** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "REQSTAT"
5. Enter **From Date** and **Thru Date** for the time period on which you wish to report.
6. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
7. Click on **Save**
8. Click on **Run**
9. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
10. Verify under **Process List** that the **Type**: Web and **Format**: PDF
11. Click **OK**
12. Record the process instance number.
13. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
14. Maximize the **Report/Log Viewer** page.
15. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
16. Adobe Acrobat will open.
17. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
18. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Department Managers Report

The **Department Managers Report** is used generate a list of the Department Table with the Manager assigned to each department.

Define Business Rules > Manage Human Resources (USF) > DOE Report > Department Managers Report

1. Select **Department Managers Report**
2. Click on **Add a New Value**
3. **Run Control ID -** DEPTMGR
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "DEPTMGR"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A "Reports to" Report

The **Department Managers Report** is used generate a list of each employee within their sub-agency and the their supervisor from the position data and employment data record.

Define Business Rules > Manage Human Resources (USF) > DOE Report > "Reports to" Report

1. Select **Reports To Report**
2. Click on **Add a New Value**
3. **Run Control ID -** RPTTO
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "RPTTO"
5. Enter **Department(s)** or **Sub-Agency(s)** for which you wish to generate report. You can enter the ten-digit Department code or the two-digit sub-agency code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on.
   If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A "Reports to" Difference Report

The **"Reports to" Difference Report** is used generates a list of differences that exist between the employees position data record and the employment data record.

Define Business Rules > Manage Human Resources (USF) > DOE Report > "Reports to" Difference Report

1. Select **Reports To Difference Report**

2. Click on **Add a New Value**

3. **Run Control ID -** RPTTODIFF

4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "RPTTODIFF"

5. Enter **Department(s)** or **Sub-Agency(s)** for which you wish to generate report. You can enter the ten-digit Department code or the two-digit sub-agency code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on.
   If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.

6. Click on **Save**

7. Click on **Run**

8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT

9. Verify under **Process List** that the **Type**: Web and **Format**: PDF

10. Click **OK**

11. Record the process instance number.

12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**

13. Maximize the **Report/Log Viewer** page.

14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.

15. Adobe Acrobat will open.

16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Job Code Table Report

The **Job Code Table** report is a list of all **Job Codes** within your *Sub-Agency*. To generate this report:

Define Business Rules > Manage Human Resources (USF) > DOE Report > Job Code Table Report

1. Select **Job Code Table Report**
2. Click on **Add a New Value**
3. **Run Control ID -** JOBCODE
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "JOBCODE"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Click on **Save**
7. Click on **Run**
8. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
9. Verify under **Process List** that the **Type**: Web and **Format**: PDF
10. Click **OK**
11. Record the process instance number.
12. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
13. Maximize the **Report/Log Viewer** page.
14. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
15. Adobe Acrobat will open.
16. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
17. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Official Position Titles Report

The **Official Position Titles** report is a list of all **Official Position Titles**. To generate this report:

Manage Positions > DOE Report > Official Position Titles Report

1. Select **Official Position Titles Report**
2. Click on **Add a New Value**
3. **Run Control ID -** PSNTTLRPT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "PSNTTLRPT"
5. Click on **Save**
6. Click on **Run**
7. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
8. Verify under **Process List** that the **Type**: Web and **Format**: PDF
9. Click **OK**
10. Record the process instance number.
11. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
12. Maximize the **Report/Log Viewer** page.
13. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
14. Adobe Acrobat will open.
15. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.
16. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating An Organization Position Titles Report

The **Organization Position Titles** report is a list of all **Organization Position Titles**. To generate this report:

Manage Positions > DOE Report > Organization Position Titles Report

1. Select **Organization Position Titles Report**
2. Click on **Add a New Value**
3. **Run Control ID -** ORGPSNRPT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "ORGPSNRPT"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s)*". Therefore, you must enter or select a **Sub-Agency** or select a specific **Department.**
8. Click on **Save**
9. Click on **Run**
10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
11. Verify under **Process List** that the **Type**: Web and **Format**: PDF
12. Click **OK**
13. Record the process instance number.
14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **<u>View</u>** appear next to your report. Click on **<u>View.</u>**
15. Maximize the **Report/Log Viewer** page.
16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
17. Adobe Acrobat will open.

18. Click on the printer icon and make adjustments to your report so it prints properly. These adjustments may include selecting “Portrait” or “Landscape” orientation or selecting “Shrink oversized pages to paper size”.

19. Once the report appears in the print preview display as you want to see it printed, click OK to send it to the printer.

Generating A Vacant Position Report

The **Vacant Position** report is a list of all **Vacant Positions** within your *Sub-Agency*. To generate this report:

Manage Positions > DOE Report > Vacant Position Report

1. Select **Vacant Position Report**
2. Click on **Add a New Value**
3. **Run Control ID -** VACPSNRPT
4. Click **Add -** You will only have to use **Add a New Value** the first time you generate this report. Every time after you can use "VACPSNRPT"
5. Enter the **Sub-Agency** or **Sub-Agencies** for which you wish to generate the report. You can enter the two-digit code if you know it or click on the magnifying glass and select from list. To add more than one **Sub-Agency**, press (+) to add a row for the next **Sub-Agency**.
6. Enter **Department** or **Departments** for which you wish to generate report. You can enter the ten-digit code if you know it or click on the magnifying glass and select them from the list available. To add more than one **Department**, press (+) to add a row for the next **Department**. Follow this procedure until you have selected each **Department** you wish to report on. If you do not select a specific **Department** for the sub agency entered, then all **Departments** for that sub agency will print.
7. If you try to select a **Department** without entering a sub agency, the system will give you an error of "*No records found matching specified key(s)*". Therefore, you must enter or select a **Sub-Agency** or select a specific **Department.**
8. Click on **Save**
9. Click on **Run**
10. When the Process Scheduler Request screen appears, select **Server Name**: PSNT
11. Verify under **Process List** that the **Type**: Web and **Format**: PDF
12. Click **OK**
13. Record the process instance number.
14. Click on **Report Manager** and scroll to the right side of the page and click on **Refresh** until you see **View** appear next to your report. Click on **View.**
15. Maximize the **Report/Log Viewer** page.
16. On the **Report/Log Viewer** page click on the report with the **.PDF** extension.
17. Adobe Acrobat will open and you should print your report from there.

9.2 Ticklers & Notices

Corporate queries will provide ticklers and employee/supervisor notices.

Generating Notices in CHRIS

The public queries will only return records for agencies to which you have access based on departmental security, and are sorted by Sub-Agency and DeptID.

1. Log into CHRIS using your Site Query ID. Navigate to **PeopleTools > Query Manager > Use > Query Manager**.
2. Type ***No*** (for "Notices") in the **Search For** box and click on the **Search** button.
3. Scroll to the desired query and click on **Run**.
4. Enter the appropriate **As Of** date at the Date Prompt. ***NOTE***: The notices should be run one time during each pay period. It is recommended you run the WGI notice no earlier than the day after payroll calc to get the correct LWOP/Nonpay hours.
5. Click on **View Results**.
6. Click on **Download results in: an Excel Spreadsheet**. Note: If the cursor has reverted to a plus symbol (+) and there are no rows filled in on the spreadsheet, there were no matching records for the pay period you entered.
7. Review the spreadsheet. DO NOT change any of the column names/headings. The Word templates use the column names to populate the notice forms.
8. Delete rows for which you do not want to generate a notice. (For example, the WGI Certification query is based on the populated WGI Due date only and reports TOTAL nonpay LWOP hours. It does not consider excess LWOP hours for which you would adjust the WGI Due date.)
9. Save the spreadsheet (File\Save As) as follows:
   - ⇨ **Save In:** C:\REPORTS
   - ⇨ **File Name:** Name the worksheet using the naming convention in the table below corresponding to the notice you are trying to generate. ***NOTE:*** You will have to overwrite this file each pay period.
   - ⇨ **Save As Type:** Microsoft Excel 4.0 Worksheet (click on the Save button).
10. Minimize Microsoft Excel.

CHRIS Notices -- Summary of Naming conventions		
Open & Run Standard Public Query:	Save completed Spreadsheet as a Worksheet named:	Open MS Word and open the matching Template doc below:
Notice_InitialProb/Trial-4mo Notice_InitialProb/Trial-Fnl	C:\Reports\ Prob4M ..XLS C:\Reports\ ProbFnl .XLS	***CHRISWRD**\ Prob4M.DOC ***CHRISWRD** \ ProbFnl.DOC
Notice_SES Probation-4mo Notice_SES Probation-Fnl	C:\Reports\ SES4M .XLS C:\Reports\ SESFnl .XLS	***CHRISWRD** \ SES4M.DOC ***CHRISWRD** \ SESFnl.DOC
Notice_Supv/Mgr Prob-4mo Notice_Supv/Mgr Prob-Fnl	C:\Reports\ Supv4M .XLS C:\Reports\ SupvFnl .XLS	***CHRISWRD** \ Supv4M.DOC ***CHRISWRD** \ SupvFnl.DOC
Notice_WGI Certification	C:\Reports\ WGIDue .XLS	***CHRISWRD** \WGIDue.DOCc

***CHRISWRD: This is the location recommended for storing the Word template documents. For confirmation of this contact you HRPOC who should have received this information from your site's IMPOC.**

Merging Notice Spreadsheets with Letter Templates in Microsoft Word

Open Microsoft Word and follow the steps below:

1. Open the appropriate form file in the *CHRISWRD Word directory. (This may be on your local PC or on your network -- check with your IMPOC if you do not know the path.) *Refer to the table above for a list of the queries and matching templates.*
2. From the menu, select Tools / Mail Merge:
3. Leave the Main Document as defaulted (to the file you have open).
4. Leave the DATA Source as defaulted if you have followed the naming conventions stated above for the Excel Worksheet. (Otherwise, click on Get Data, select Open data source, and locate the appropriate worksheet wherever you saved it.)
5. Click on the Merge Button.
6. Click on the Merge button on the next popup screen.
7. When the merge is complete, review the output and save the merged document.
8. Print the notices. *DO NOT* use double-sided printing.
9. Close the merged document. This still leaves the original merge template open.
10. When you try to close the merge form, Word will ask if you want to save the changes you made. Click on *No*.

NOTE: If desired, you can save the Word template under another name, delete the merge fields, then type the data directly into the Word template to send out an individual notice.

Tickler Queries

The public queries will only return records for agencies to which you have access based on departmental security, and are sorted by Sub-Agency and DeptID.

1. Log into CHRIS using your Site Query ID. Navigate to **PeopleTools > Query Manager > Use > Query Manager**.
2. Type ***Tick*** (for "Ticklers") in the **Search For** box and click on the **Search** button: The third column in the pick list shows whether the query is Private or Public. Private queries are listed first. (You will only see the private queries created by your site's query ID.)
3. Scroll to the desired query and click on **Run**.
4. Enter the appropriate As Of date at the Date Prompt (see table below).
5. Click on **View Results**.
6. Click on **Download results in: an Excel Spreadsheet**. Note: If the cursor has reverted to a plus symbol (+) and there are no rows filled in on the spreadsheet, there were no matching records for the pay period you entered.
7. Review the spreadsheet. ***REMINDER:*** The WGI Due Tickler query is based on the populated WGI Due date only and reports Total non-pay LWOP. It does not consider excess LWOP hours in which you would adjust the WGI Due date.
8. Format spreadsheet as desired. ***NOTE:*** Legal paper (8.5 X 14) is recommended.
9. **Save** (File \ SAVE AS) and **Print** the worksheet.

Tickler Queries		
Query	**Date Prompt**	**Returns**
Tick_AppointmentExpires	1st Day of Pay Period	All that expire Within that PP
Tick_InitialProbTrialPeriodExp	1st Day of Pay Period	All that expire Within that PP
Tick_LWOP Expires	1st Day of Next Pay Period	All that expire **Before** that PP
Tick_SES Probation Exp	1st Day of Pay Period	All that expire Within that PP
Tick_Supv/Mgr Probation Exp	1st Day of Pay Period	All that expire Within that PP
Tick_TempPromotionExpires	1st Day of Next Pay Period	All that expire **Before** that PP
Tick_Tenure Action	Next Pay Period Start Date	All that may be eligible within 60 days.
Tick_WGI Due	1st Day of Next Pay Period	All that fall due **Before** that PP

Modifying a Public Query

NOTE: If you modify a standard public query to meet site-specific needs, remember to user your private modified query in the future when following the instructions in this document for running and merging the associated public query. (You do not have to modify the queries.)

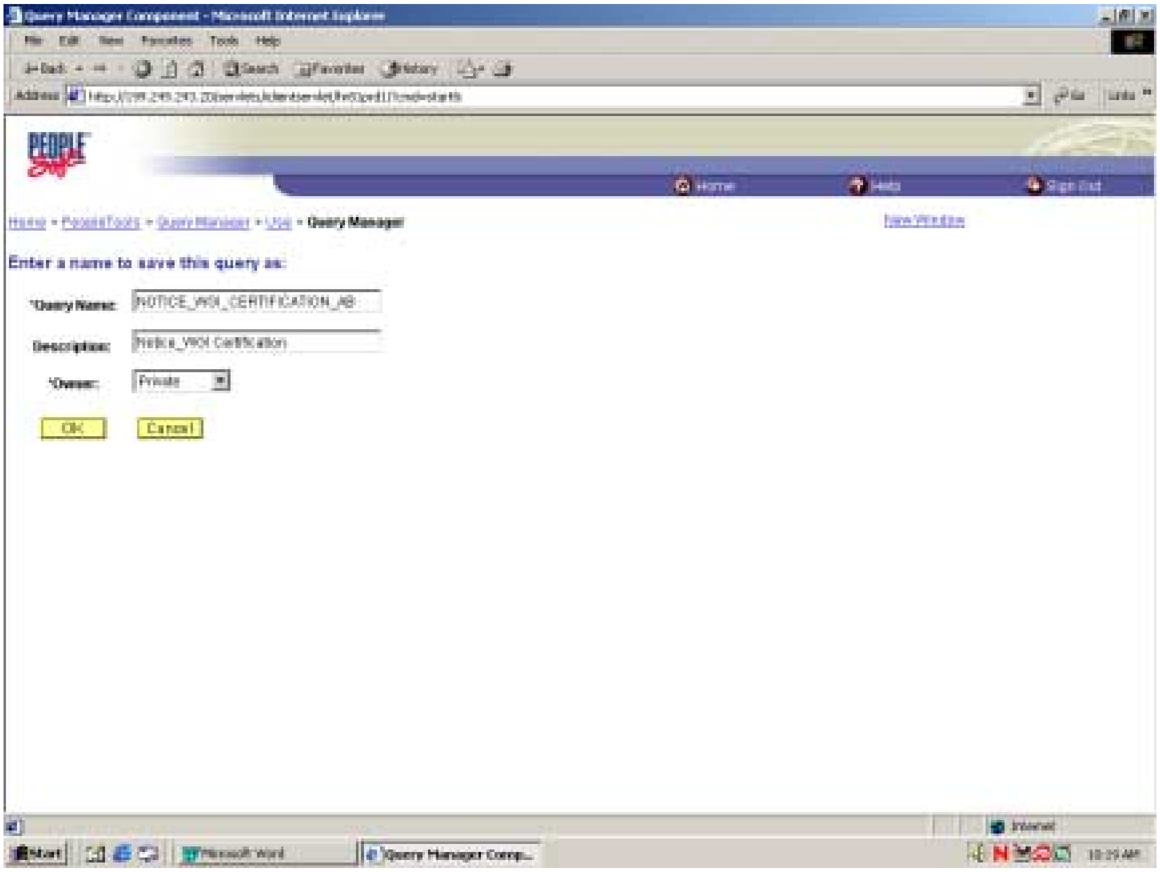
To modify a public query to run notices only for a Specific Sub Agency, Please follow the steps below:

1. Log into **CHRIS** using your site's query ID and password. The site query ID automatically launches the Home Menu Screen.
2. Navigate to Query Manager by clicking on **PeopleTools > Query Manager > Use > Query Manager**.
3. Open the public query you want to modify, for example: "**Notice_WGI_Certification**" by typing **NOTICE_WGI_CERTIFICATION** into the "**Search For**:" text box, then click the **Search** button. **Note:** The third column in the picklist shows the type of Query i.e. Public or Private. (You will only see the private queries created by your site's query ID.)
4. Click on Query Name (**Notice_WGI_Certification**) to open the selected query. Note: The Query Screen will default to the **Fields Tab**.
5. Click on "**Save As**" and Rename the Query. Click the "**OK**" to accept.
6. Make your modifications (See the example below)
7. Check that the owner field is set to **PRIVATE**, then click the Save button to save your modifications. Once this is saved, follow the instructions for running the original public query, but use the new private query you created.

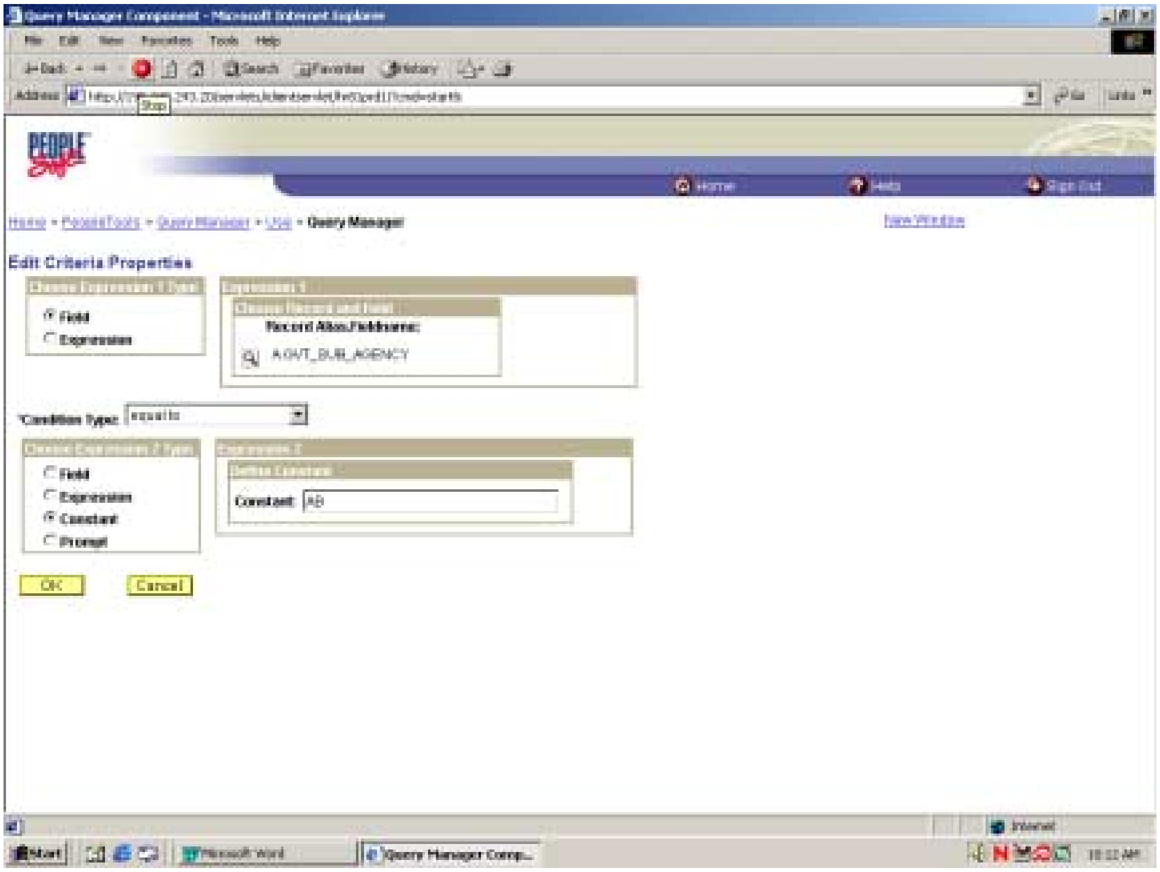
Example 1

Your site has three Sub-Agencies (ex. AB, BC, and CD) and you want to modify the Notice_WGI Certfication query so that you can run it separately for each Sub-Agency.

1. Open the Public Query: Notice_WGI Certification. Note: If needed refer to the instructions above for opening a query.
2. Click on the Properties Tab then select the Private option from the Owner Drop-Down list
3. Click "**Save As**" to Save and rename the file as "Notice_WGI_Certification_AB". Note: The Owner Field should display the "**PRIVATE**" Option.



4. Click "**OK**" .
5. Modify the query:
   a) Click on the Field radio button, locate field **A.GVT_SUB_AGENCY** and Click on the  corresponding **Grey Funnel Icon with a plus sign**. This opens the **Edit Criteria Properties** which allows new criteria to be added to the query.
   b) Select the "**Equal to**" option from the Condition type Drop-Down list. Note: "**Equal To**" may already be selected.
   c) Click "**Constant"** radio button under the Choose Expression 2 Type group box. Note: Constant may already be selected.
   d) Type: "**AB**" in the Constant text box under the Define Constant Group Box.
   e) Click OK to accept changes.
   f) Before Saving: Click on the **Properties TAB** to verify that the owner Field displays "**Private**".
   g) Click the "**Save**" button to save your modifications.



Example 2

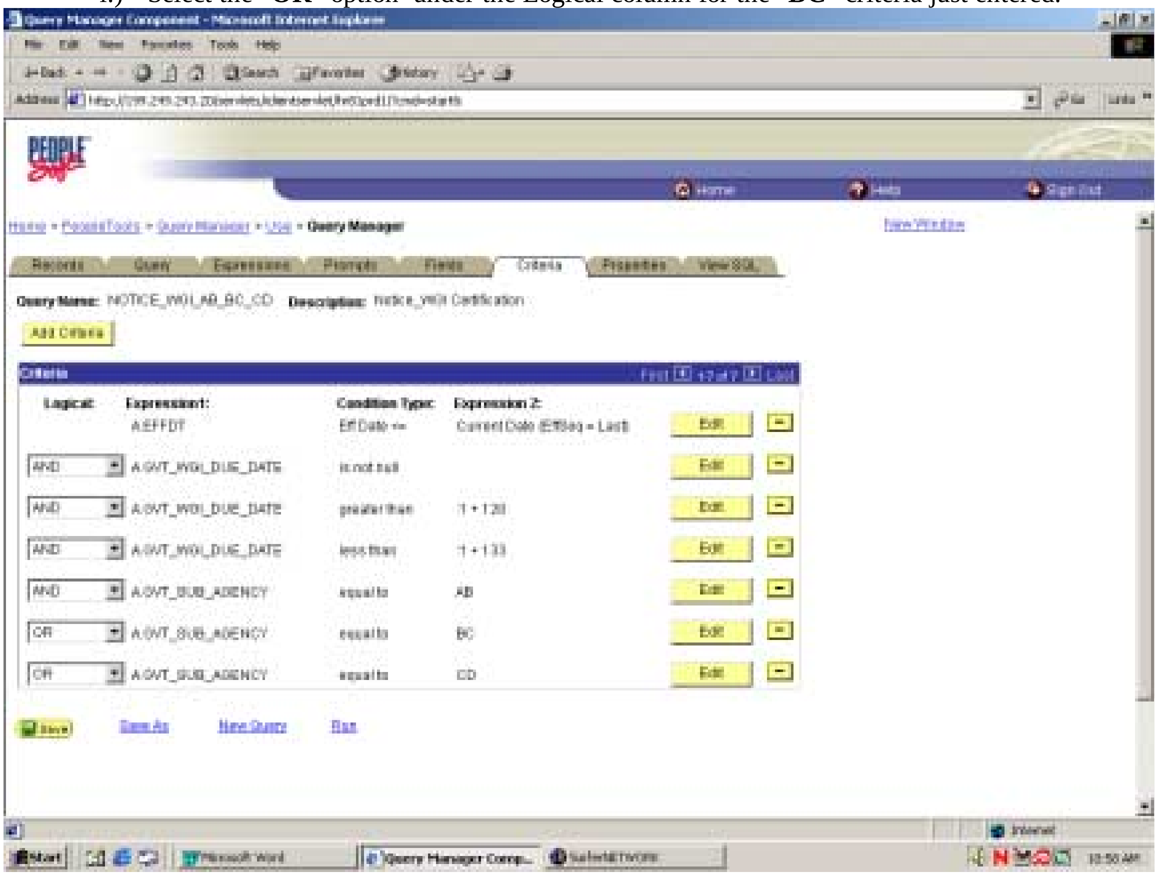
Your site has five Sub-Agencies (ex. AB, BC, CD, DE, and EF) and you want to modify the "**Notice_WGI Certification**" query so that you can run it separately for one group of Sub-Agencies (AB, BC, and CD).   Follow step 1 through 5e in Example1, naming your private query "**Notice_WGI_AB_BD_CD**" then follow steps 5f and 5g below:

f.) Click on the **Fields TAB** and repeat step 5a through 5c

g.) Type "**BC**" in the Constant text box under the Define Constant Group Box.

h.) Click "**OK"** to accept changes

i.) Select the "**OR**" option under the Logical column for the "**BC**" criteria just entered.



j.) Repeat steps 5f through 5i replace constant value of "**BC**" with "**CD**".

k.) Keep repeating these steps until you have added all the Sub –Agencies you want in this query, then Click "**OK"** to accept changes.

l.) Before Saving: Click on the **Properties Tab** to verify that the owner field displays a value of "**Private**". Note the name of the Query should be "**Notice_WGI_AB_BC_CD"**.

m.) Click the **Save** button to save your modifications.

NOTE: If employees are appearing twice within a single query, the following must be done to eliminate this from occurring on any future queries:

1. Click on the **Properties TAB**.
2. Click on the check box beside **Distinct** to select it.
3. Click “**OK”.** If the box is checked, the query should not generate multiple lines for the same record.
4. Click the “**Save”** button to save your modifications.

10 Automatic Processes

Contents

10.1 Automatic WGI

Processing Automatic and Manual Within-Grade Increases (WGI's)

Automatic WGI's will be processed the second Monday of each pay period. This cycle has been established to allow LWOP hours for the previous pay period to be posted in CHRIS on the first Friday of each pay period. Unfortunately, some WGI's will still have to be processed manually.

- Employee has LWOP during the waiting period;
- Employee does not have a valid (or current) performance rating during the last 15 months;
- Performance rating is not fully successful or satisfactory (level 2 or below);
- REQ action is pending;
- Future dated PRO action was processed effective on or after the effective date of the WGI.

It is imperative for HR offices to maintain updated performance appraisal information in CHRIS. The automated program verifies if an employee has an acceptable (or pass) appraisal within the past 15 months in CHRIS. If so, the WGI action will be automatically updated in CHRIS in the pay period that it is effective. If the employee's latest performance appraisal (ending date) is greater than 15 months, NO WGI WILL BE PROCESSED AUTOMATICALLY. In this case, the CHRIS user will need to manually key the WGI action in CHRIS which will adversely affect the time and labor savings the automated program will provide.

NOTE:
If you are processing a promotion (or a conversion that results in a higher grade for the employee), you are reminded to wait until the second week of the pay period to process the action. Since the WGI could impact pay on the promotion or conversion, these actions should not be entered in CHRIS until after automatic WGIs have been processed the second Monday of the pay period.

The following procedures are recommended for WGI processing:

At the **beginning** of **each** pay period:

- Run WGI Tickler Report (**Tick_WGI Due**) for the current pay period.
    - Verify that all applicable level of competence certifications have been received from supervisors for WGI's due during current pay period.
    - Verify that all employees have a performance rating in CHRIS dated within the last 15 months and enter missing ratings, as appropriate.
    - Process NOA Code 888-WGI Denial, as appropriate.
    - Re-calculate new WGI Due Dates, as appropriate, for employees with excess LWOP, process NOA Code 966, set WGI Override to Manual, and enter new WGI Due Date.

- Generate WGI Notices/Certifications (Notice_WGI Certification) for WGI's due 120 days henceforth and forward these notices to supervisors for certification of acceptable level of competence.

Beginning on the **second** **Tuesday** of **each** pay period:

- Run the following queries:
  - **N_WGI_Processed -** This report will list employees who received WGI's for the current pay period through the automatic WGI process. You will be prompted to enter the pay period beginning date when you run this query.
  - **N_WGI_Due_Failed -** This report will list employees eligible for WGI's but not processed in the automatic WGI cycle for the current pay period. You will be prompted to enter the pay period beginning date when you run this query.
  - **N_WGI_Past_Due -** This report will list any employee who, according to their WGI Due Date, was due for a WGI prior to the current pay period but the WGI has not been processed.
- Review the above reports and process manual WGI's, as appropriate.
- Print and distribute SF-50's for WGI's processed during the pay period. Use mass printing capabilities to print these SF-50's.

11 Mass Processes

Contents

11.1 Awards

Requesting/Processing Mass Awards Actions In CHRIS

Mass award actions for cash, time off, suggestion, SES, and travel incentive award actions can be processed in CHRIS by submitting a specially formatted Excel spreadsheet with the award amounts. This process should not be used for mass processing of performance awards in conjunction with Performance Rating (see Section 11.6). Follow the steps below to request/submit mass awards for processing in CHRIS.

Step 1: Logon on to CHRIS using your site's query ID and password.

Step 2: Path: **Home** >**PeopleTools > Query Manager > Use > Query Manager**
Type N_MASS in the 'Search For' field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the '**Run**' hyperlink for N_MASS_ AWARD_CANDIDATES to generate a list of your employees.

Step 3: Click on the hyperlink for 'Download results in : an Excel Spreadsheet'
to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name Acct Code, Deptid, Pay Plan, Grade, Step, Base Pay, Wrk Sched, Hire Date, Last Promo Date, Perf Rating, Review Date, Awd Amt and Awd Hrs.

Step 4: Save the report using a file name that you choose. Note: If any of the award parameters listed in step 9 below are different you will need to save this EXCEL report under additional file names to accommodate the different mass award runs. A separate EXCEL file will need to be provided to the CHRISFUNCTIONAL@ netl.doe.gov for each mass awards run.

Step 5: The spreadsheet may be used for award calculations. However, please heed the following warnings:

Whether you are processing cash, suggestions, SES, travel incentives, or time off awards for a group of 15 employees or 150 employees, you can generate the specially-formatted spreadsheet from CHRIS and enter the award amounts. You must use separate spreadsheets if the NOA Code/Action Reason or Effective Date are different for the group of employees. If a spreadsheet lists both cash and time-off awards, and all time-off awards have the same NOA Code/Action Reason and effective date and all of cash awards have the same NOA Code/Action Reason and effective date, the awards can be processed on the same spreadsheet. Example: The Action Reason is TOP, the NOA Code is 846, and the effective date is 02-11-02 for all time-off awards; and the Action Reason is PCA, the NOA Code is 840, and the effective date is 02-11-02 for all cash awards.

When you are finished, submit the spreadsheet along with the other required information (such as: effective date, NOA Code, action reason, etc.) to the CHRIS Functional Hotline at CHRISFUNCTIONAL@netl.doe.gov for automatic processing in CHRIS. You will be notified when the actions have been processed so that you can run the mass print program to generate the SF-50 personnel actions.

WARNINGS:

- **COLUMNS "A" THROUGH "R" MUST NOT BE ALTERED.**
- **IF AWARD CALCULATIONS ARE PERFORMED IN THIS EXCEL FILE, COLUMNS "S" THROUGH "IV" MUST BE USED FOR THESE CALCULATIONS.**
- **THE ACTUAL AWARD <u>AMOUNT</u> (NOT FORMULA) MUST BE ENTERED OR PASTED IN COLUMN "Q" FOR AWARD NOA Code's 840, 841, 842, 843, 845, 878, AND 879.**
- **THE ACTUAL AWARD <u>HOURS</u> (NOT FORMULA) MUST BE ENTERED OR PASTED IN COLUMN "R" FOR NOA Code'S 846 AND 847.**
- **ANY NEW COLUMNS ADDED FOR CALCULATIONS MUST BE REMOVED FROM THE SPREADSHEET BEFORE IT IS FORWARDED TO THE CHRIS FUNCTIONAL STAFF FOR MASS AWARDS PROCESSING.**

Step 6: For NOA Code's 840, 841, 842, 843, 845, 878, or 879 enter the Awd Amt in column "Q"; For NOA Code's 846 and 847 enter the Awd Hrs in column "R".

Step 7: Remove any columns used for award calculations and save the spreadsheet.

Step 8: Send the EXCEL file(s) by E-mail to CHRISFUNCTIONAL@netl.doe.gov and include in the E-mail the following parameters for each run:

<u>Award Parameters</u>:
Effective Date
Action Date
Action Reason
NOA Code
Legal Authority (For NOA Code 878 actions only)

This information should be provided to the CHRIS staff as soon as the spreadsheet is completed and the effective date is established. These mass actions should be processed during the pay period in which they are effective. **At this time, a separate spreadsheet will be needed if the NOA Code/Action Reason and/or Effective Date are different for the group of employees.**

Step 9: Once the mass awards run(s) are completed, the CHRIS staff will provide reports of the mass awards completed as well as any awards that will need to be processed manually.

Step 10: Using the mass printing capability generate the necessary copies of the SF-50's.

11.2 Organization Title Changes (NOA Code 929)/ Realignments (NOA Code 790)

Generating A Crosswalk Query for Use in Requesting Mass Organization Name Changes or NOA Code 790 Realignment Action

Once the CHRIS Functional Staff is notified by Tom Wheeler of an approved reorganization you will be notified via e-mail to generate a crosswalk of changes for use in processing mass actions.

The e-mail will include a copy of the approval memo from Tom Wheeler, and a request for necessary information to prepare for the requested changes. Within the e-mail we will ask for verification of the effective date proposed by T. Wheeler, and what verbage will be used for the required UNM on mass realignment (NOA Code 790) actions. Upon receipt of this e-mail, it is very important that you develop a crosswalk of all employees affected by the change.

Using your Query Site ID, run the query **N_Mass_Reorganization_Request**. The query will prompt you for a full or partial Department ID.

- If the reorganization affects all departments within your subagency or several departments that are distinguishable by the first few digits of the department ID, you can enter a partial department ID such as 726%. This would generate a report with all departments that start with 726.

- If the reorganization affects only one department within your subagency you can enter the complete Department ID, or as many characters as are required to distinguish it from all other department IDs. This will generate a report of only the department requested.

The query will include the following criteria: Department ID, Department, Name, Position Number, Jobcode, and Emplid.

When the need arises for use of this report, it is important that you **do not** delete or remove any employees from the report. In order for the CHRIS Staff to process the mass actions, you will need **only** to add an additional column at the end of the spreadsheet labeled **New Department**. For each employee listed, enter one of the following in the New Department column: No Change, Reassignment (this means that you will be processing a manual action to reassign this employee as part of the reorganization), or the **new** department id to which the employee is being realigned. If the reorganization involves a change in department name, enter “929” in the New Department column.

11.3 Mass Printing

The following menu paths will be used to access and complete the mass print pages:

For SF-50:
Administer Workforce/Administer Workforce/DOE Report/Notice of Personnel Action/Parameters*

For SF-52:
Administer Workforce/Administer Workforce/DOE Report/Request for Personnel Action/Parameters*

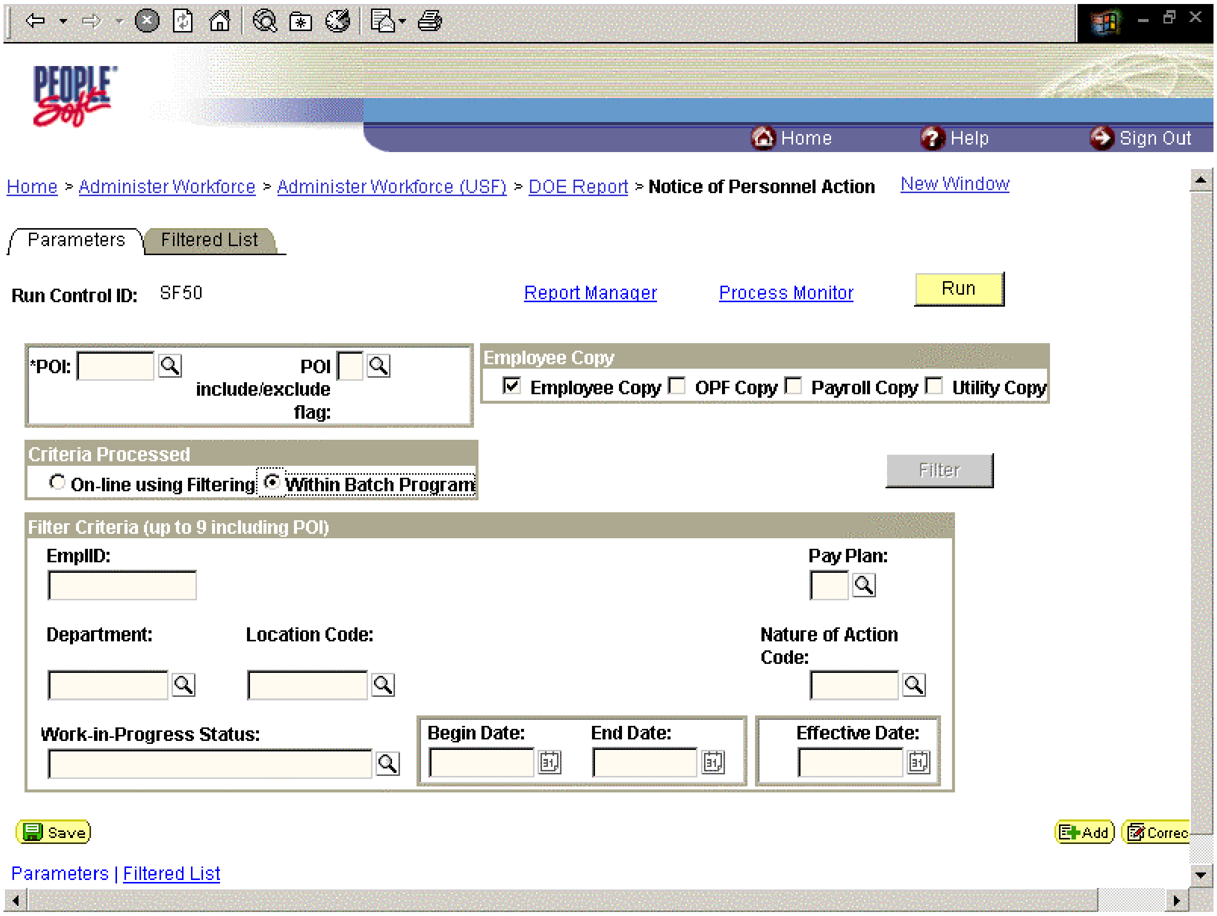
* Each user will need to add a separate Run Control for the SF-50 and SF-52. We recommend that you name the SF-50 Run Control as “SF50” and the SF-52 Run Control as “SF52”. Click on the Add a New Value hyperlink the first time you use each of these mass processes. Once you have added a Run Control for both SF-50 and SF-52 you will be able to reuse the Run Controls each time you mass print SF-50/SF-52.

Examples of When to Mass Print Actions:
If a court order or EEO settlement case requires the processing of several personnel actions (e.g., new actions or corrections) for an employee, rather than printing the SF-50 immediately after you key each action, run the mass print program to generate all the SF-50s by EmpID and by the range of effective dates. Mass printing all of the actions when you have finished performing the data entry is faster and will save time.

If you are entering several different types actions in CHRIS at one time, such as retirements or resignations effective 12/29/00 and 12/30/00, run the mass SF-50 print program immediately after you have finished entering these actions rather than printing them one at a time. You can define your mass print request to select a specific NOA code and a specific effective date or date range.

INSTRUCTIONS FOR COMPLETING MASS PRINT PAGES FOR SF-50'S

Parameters Page



POI

Enter the POI for which you want to print actions.

POI Include/Exclude Flag

Select the appropriate POI Flag:

If POI Flag is left blank, actions will print for all subagencies for the POI selected (Ex: if you enter POI 4162, actions for both 4162 and 4162A will print).

% - is the same as leaving the POI Flag blank.

= - will print only the actions for the sub-agency selected in the POI field. (Ex: If you enter POI 4162 and select = for the POI Flag, 4162 actions will print, but not 4162A).

I **-** Not available for use at this time.

E **-** Not available for use at this time.

Copies Requested

You can select all four copies (Employee, OPF, Payroll, Utility) to print together as a set for each action or you can select a specific copy to print for each action (e.g., Employee copy only). If you are printing your annual general schedule increases, for example, we recommend that you go through the mass print process four times, first printing the Employee copies, then the OPF copies, etc. This will eliminate the need to manually sort each set for distribution.

Criteria Processed

- **On-Line using Filtering** – This option gives you the opportunity to further define your print outcome in addition to the filter criteria on the above page. You also will have the opportunity to further define your criteria using the following fields: National ID and Name.

- **Within Batch Program** – This option will print every record that meets the criteria you have established on the above page. National ID and Name will not be available as filter criteria options. Also, you will not have the opportunity to further define filter criteria on the Filtered List page. This option will generally be used to print large quantities of actions having the same NOA Code (e.g., annual pay increases, mass awards, etc).

Filter Criteria

Carefully select relative filter criteria from the list below for the actions you want to print. Enter data only in required fields and those fields that define your print request. Leave all other fields blank.

- **Emplid/National ID/Name**: Enter the employee’s Emplid, National ID or Name if you want to identify actions to print for a specific employee.

- **Pay Plan**: Enter appropriate Pay Plan or select Pay Plan from the drop down box if you want to print actions for a specific Pay Plan.

- **Department**: Enter a specific Department ID or a partial Department ID. Use the partial Department ID only if you want to print SF-50's for a broad range of departments within your subagency. Be very careful when using this wildcard option as you may print more SF-50's than you need.

- **Location**: Enter a specific Location Code or a partial Location Code. Use the partial Location only if you want to print SF-50’s for a broad range of locations. Be very careful when using this wildcard option as you may print more SF-50’s than you need.

- **Nature of Action Code**: Enter the NOA Code or select the appropriate NOA code from the drop down box if you want to print actions for a specific NOA Code.

- **Work-in-Progress Status**: Usually this criteria will be left blank. However, you can specify that you want to print only actions with WIP Status of “PRO” or “COR”.

- **Begin Date**: The beginning effective date of the actions for the range in which you are printing. **This is a required field if using a date range.**

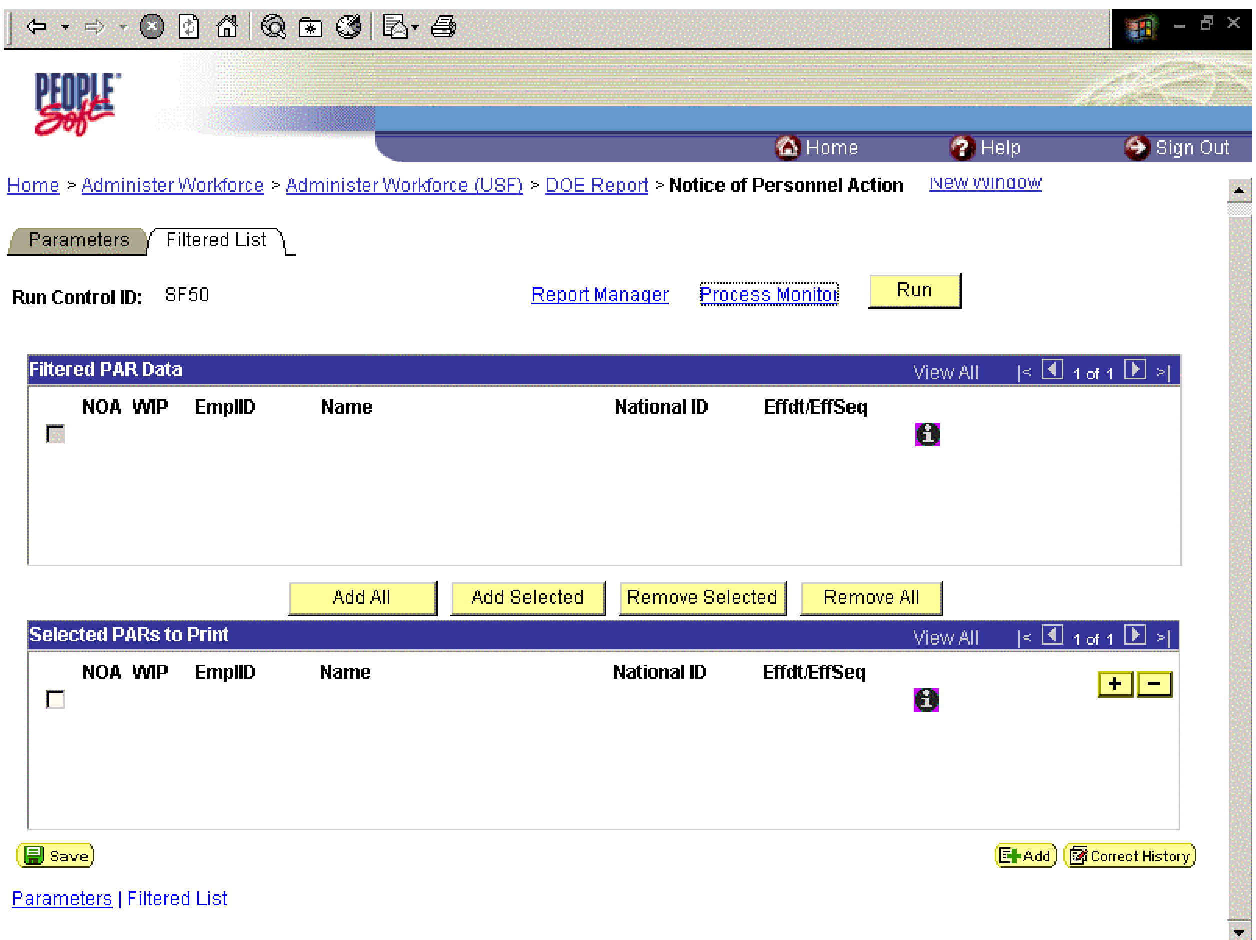
- **<u>End Date</u>**: The end effective date of the actions for the range in which you are printing. **<u>This is a required field if using a date range</u>. If you are using a date range, the criteria will select every action (meeting the other criteria you have selected) with an effective date on the Begin Date, on the End Date, or between these two dates.**

- **<u>Effective Date</u>**: This is for printing all actions effective on the date entered. **<u>This is a required field if you are not using a date range</u>.**

<u>You must use either a date range or an effective date--you may not use both</u>.

Filtered List Page

You will use this page only if you selected "On-Line" as the Criteria Processed option on the Parameters page. If you selected "Within Batch Program" as Criteria Processed, skip to **Last Step** in these instructions to complete your print job.



When using the On-Line printing option in conjunction with the Filter button, you can further define additional filter criteria using the above Filtered List page:

The records meeting the criteria on the Parameters page are displayed in the upper half (Filtered PAR Data) of the Filtered List page. If you are using the On-Line print option in conjunction with the Filter button, the only actions that will be included in your print job will be those that ultimately get added to the lower half (Selected PAR’s to Print) section of the above page.

The first two buttons ‘Add All’ and ‘Add Selected’ on this page apply to copying records from the filtered PAR Data to the Selected PAR’s to Print section of the page.

Add All – Takes every record displayed in the Filter PAR Data and adds it to the Selected PAR’s to Print.

Add Selected – Adds any records from the Filtered PAR Data that are checked in the Selected PARs to Print list.

The last two buttons “Remove Selected” and “Remove All” on this page apply to removing selected records from the Selected PAR’s to Print section of the page.

Remove Selected – Will remove all records that are checked from the Selected PARs to Print list.

Remove All – Will clear all records from the Selected PARs to Print.

If you click on the information or “i” button, additional information will display for the action.

Last Step:

Once you have completed data on the Parameters page (and the Filtered List page, if appropriate) and you are satisfied that you have identified the SF-50's that you want to print, complete the following steps to run your print job:

Click on “Save”
Click on the RUN button (top right corner)
Complete the Process Scheduler Request page as follows:

- **Server Name: PSNT**
- **Type: Web**
- **Format: PDF**
- **Click “OK” to begin print job.**

INSTRUCTIONS FOR COMPLETING MASS PRINT PAGES FOR SF-52’S:

On the rare occasion that you need to mass print SF-52’s, use the same procedures outlined above for SF-50’s. However, you will note that the “Copies Requested” section on the Parameters page will be grayed out since multiple copies of the SF-52 are unnecessary.

11.4 Mass Ratings

REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES

Performance ratings can be processed in mass by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR offices must follow the steps below to request/submit mass processing.

Requesting Mass Performance Ratings (Without Awards)

Step 1: Logon on to CHRIS using your site's query ID and password.

Step 2: Path: **PeopleTools > Query Manager > Use > Query Manager.** Type N_Mass in the "Search For" field and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "**Run**" hyperlink for N_MASS_APPRAISAL_CANDIDATES to generate a list of your employees.

Step 3: Click on the hyperlink for 'Download results in : an Excel Spreadsheet' to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

Step 4: You will receive a prompt box to enter:

- ReviewDate
- ReviewFrom
- ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Deptid, Pay Plan, Old Rvw Date, New Rvw Date, Review From, Review To, Rating Pattern, and Perf Rating.

Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf Rating column (except the column header) immediately to ensure that the old level is not confused as the new level.

Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. **If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made.** Highlight the columns. From the EXCEL menu select: Format/Cells/Number Tab/Text.

New Rvw Date: Enter the new Date (Format: YYYY-MM-DD)
Review From: Enter the beginning date of the period (Format: YYYY-MM-DD)
Review To: Enter the ending date of the period (Format: YYYY-MM-DD)

Rating Pattern: Be sure this column contains the pattern for the new ratings being processed.
Perf Rating: Be sure this column reflects the employee's new Performance Rating.

Step 7: Save the report using a file name that you choose.

Step 8: Send the EXCEL file(s) by E-mail to CHRISFUNCTIONAL@netl.doe.gov.

Step 9: Once mass processing has been completed, the CHRIS staff will provide a report of ratings completed as well as any that will need to be processed manually.

Step 10: As always, if you have any questions or if the CHRIS staff can be of assistance, please do not hesitate to call the CHRIS Functional Hotline on (304) 285-1310.

11.5 Mass Ratings With Awards

REQUESTING/PROCESSING MASS PERFORMANCE RATING UPDATES WITH AWARDS

Performance ratings with award actions can be processed in mass by submitting a specially formatted Excel spreadsheet with required information to the CHRIS Functional Hotline. HR offices must follow the steps below to request/submit mass processing.

Requesting Mass Performance Ratings With Awards

Step 1: Logon on to CHRIS using your site's query ID and password.

Step 2: Path: **PeopleTools > Query Manager > Use > Query Manager.** Type N_Mass in the "Search For" field a

and click on the Search button to generate a list of mass action queries. In the resulting query list, click on the "**Run**" hyperlink for N_MASS_PERFAWARDS_CANDIDATES to generate a list of your employees.

Step 3: Click on the hyperlink for 'Download results in : an Excel Spreadsheet'

to run the report to EXCEL. On the File Download page, select "Open this file from its current location" and click on OK. If you see an 'Open With' window, choose MicroSoft Excel as the program you want to use.

Step 4: You will receive a prompt box to enter:

- ReviewDate
- ReviewFrom
- ReviewTo

If you enter these dates the corresponding columns will populate on the spreadsheet. You may choose to leave one or more of these date columns blank. If these dates are not entered in the prompt box, the spreadsheet will generate without information in these columns.

The following data fields will be included in the EXCEL report: POI, SA, Emplid, NID, Name, Acct Code, Deptid, Pay Plan, Grade, Step, Base Pay, Wrk Sched, Hire Date, Last Promo Date, Old Rvw Date, Awd Amt, Awd Hrs, New Rvw Dt, Review From, Review To, Rating Pattern, and Perf Rating.

Step 5: The spreadsheet will contain the most recent performance information from CHRIS in the Rating Pattern and Perf Rating columns. The new rating information must be reflected in these columns when your spreadsheet is sent to the CHRIS staff for processing. If your office uses Pattern "A" (pass/fail), and your pattern has not changed during the period, very few changes will need to be made to these columns. If your office uses other than a Pattern of "A" (pass/fail), you should clear the Perf column (except the column header) immediately to ensure that the old level is not confused as the new level.

Step 6: Complete/revise the following columns before sending your spreadsheet(s) to the CHRIS staff for processing. **If you need to make changes to the performance date columns referenced below, these columns must be reformatted in "Text" format before changes are made.** Highlight the columns. From the EXCEL menu select Format/Cells/Number Tab/Text.

Awd Amt: Enter the amount for any cash awards – Leave "0" in this cell if the employee is not receiving a cash award.
Awd Hrs: Enter the amount for any time-off awards – Leave "0" in this cell if the employee is not receiving a time-off award.
New Rvw Dt: Enter the new Date (Format: YYYY-MM-DD)
Review From: Enter the beginning date of the period (Format: YYYY-MM-DD)
Review To: Enter the ending date of the period (Format: YYYY-MM-DD)
Rating Pattern: Be sure this column contains the pattern for the new ratings being processed.
Perf Rating: Be sure this column reflects the employee's new Performance Rating.

Step 7: Save the report using a file name that you choose.

Step 8: The spreadsheet may be used for award calculations. However, please heed the following warnings:

WARNINGS:

- **COLUMNS "A" THROUGH "V" MUST NOT BE ALTERED.**
- **IF AWARD CALCULATIONS ARE PERFORMED IN THIS EXCEL FILE, COLUMNS "W" THROUGH "IV" MUST BE USED FOR THESE CALCULATIONS.**
- **THE ACTUAL AWARD AMOUNT (NOT FORMULA) MUST BE PASTED IN COLUMN "P" FOR AWARD NOA Code's 840, 841, 842, 843, 845, 878, AND 879**
- **THE ACTUAL AWARD HOURS (NOT FORMULA) MUST BE PASTED IN COLUMN "Q" FOR NOA Code's 846 AND 847.**
- **ANY NEW COLUMNS ADDED FOR CALCULATIONS MUST BE REMOVED FROM THE SPREADSHEET BEFORE IT IS FORWARDED TO THE CHRIS FUNCTIONAL STAFF FOR MASS AWARDS PROCESSING.**

Step 9: If an employee in the group will receive a rating but not an award, enter the rating information and do not alter the Awd Amt or Awd Hrs columns.

Step 10: For NOA Code's 840, 841, 842, 843, 845, 878, or 879 enter the Awd Amt in column "P"; For NOA Code's 846 and 847 enter the Awd Hrs in column "Q".

Step 11: Remove any columns used for award calculations and save the spreadsheet.

Step 12: Send the EXCEL file(s) by E-mail to CHRISFUNCTIONAL@netl.doe.gov and include in the E-mail the following parameters for each run:

Award Parameters:

Provide the following award parameters to the CHRIS staff in your E-mail that transmits your completed spreadsheet:

Effective Date
Action Taken date
Reason Code
NOA Code
Legal Authority (For NOA Code 878 actions only)

This information should be provided to the CHRIS staff as soon as the spreadsheet is completed and the effective date established. These mass actions should be processed during the pay period in which they are effective. **A separate spreadsheet will be needed if the NOA Code/Reason Code and/or Effective Date are different within the cash award group or if these parameters are different within the time-off awards group.**

Step 13: Once the mass processing has been completed, the CHRIS staff will provide reports of the mass ratings and awards completed as well as any that will need to be processed manually.

Step 14: As always, if you have any questions or if the CHRIS staff can be of assistance, please do not hesitate to call the CHRIS Functional Hotline on (304) 285-1310.

11.6 Mass Cleanup "Reports To"

PROCEDURES FOR REQUESTING MASS CORRECTIONS/UPDATES TO "REPORTS TO POSITION" AND "SUPERVISOR ID"

Mass processing capability is available to correct/update "Reports to Position" and "Supervisor ID" information. Two different processes will be used to make these changes. Existing Position Data records and personnel transactions may be updated or new rows of data may be inserted, depending on the effective date of the requested changes and the effective date of the employee's most recent position and personnel transactions. These processes will update records for active positions and active employees only.

"Reports to" Cleanup

This process will be used to update "Reports to" information on both the Position Data and personnel transactions for an entire subagency, or for a portion of a subagency. It provides a feature to identify "included" or "excluded" Department ID's within a given subagency. These updates will be based solely on the Department Manager's position identified in the Department Table.

"Reports to" Changes

This process will be used to update/change "Reports to" information on both Position Data and Job records when 1) there are multiple supervisors within a Department ID, 2) there is a different supervisor other than the one identified in the Department Table, or 3) there are only selected employees or positions within a Department ID to be changed/updated.

To request mass processing to "Reports to" information:

1. Print the following reports from CHRIS using the following path:

   Define Business Rules > Manage Human Resources > DOE Reports

   (You may also request these reports in EXCEL format by calling the CHRIS Functional Hotline (304-285-1310) or sending an E-mail to CHRISFUNCTIONAL@netl.doe.gov.)

   - Department Managers Report
   - "Reports to" Report
   - "Reports to" Differences

   Develop Workforce > Manage Positions > DOE Reports

   - Vacant Positions Report

2. Carefully review the Department Managers Report. Using a black pen, annotate the report with the name, position number and the effective date the supervisor entered the supervisory position for any required revisions. Fax the changes to the CHRIS Functional Hotline at 304-285-4553. Once these corrections are made to the "Manager's Position" in the Department Table by the CHRIS staff, the "Reports to Position"

number will automatically populate when new Position Data records are established in CHRIS. However, these changes will not automatically update positions or transactions already in CHRIS.

3. Carefully review the Vacant Positions Report and inactivate any positions that will not be filled in the near future. Provide a list of vacant positions to be included in the mass updates with appropriate supervisory information to the CHRIS staff. These changes can be annotated on your Vacant Positions Report. Reminder – All **active** positions (occupied or vacant) will be updated automatically when the Mass “Reports to” Cleanup described above is run. Inactive positions will not be updated in either process.

4. Review the “Reports to” Report and the “Reports to” Differences for all employees within your subagency. Using a black pen, annotate the reports with any required “Reports to Position” changes. Please include on your report the supervisor’s name, Emplid, position number, and the effective date the supervisor entered a new supervisory position. Also, include the effective date for the requested changes. It is recommended that these changes be effected with a current date rather than retroactively. The main focus should be to ensure that the most recent Position Data record and personnel transaction contains correct supervisory information.

5. Fax a copy of the report to the CHRIS Functional Hotline at 304-285-4553 to request mass changes.

6. Mass processes are typically run on the Thursday following the beginning of the pay period in which they are effective. Please ensure that your requests allow sufficient lead time for the CHRIS Functional Staff to plan and run the process.

7. The CHRIS staff will review requests for mass “Reports to” updates/corrections, determine which mass process to use to accomplish the requested changes and run mass updates working closely with the HRPOC or other individual designated by the HRPOC to resolve questions/issues.

8. After the CHRIS staff has completed mass updates, the HR office will be asked to print new copies of the reports discussed in number 1 above to verify that employees report to proper supervisors following the mass updates.

9. These mass processing capabilities do not preclude offices from processing manual transactions to update “Reports to” information.

12 Web Applications

Contents

12.1 Employee Service Record - (Formerly SF-7)

The Employee Service Record web application utilizes the historical employee service data maintained in DOEInfo (Corporate Employee Data Repository). Historical employee service data contained in DOEInfo was initially populated from PAY/PERS data and is continually updated on a daily basis with all new actions processed in CHRIS.

TO GAIN ACCESS TO SF-7 EMPLOYEE SERVICE RECORD WEB APPLICATION:
This application is intended for use by staff of Servicing Personnel Offices who need to view or print Employee Service Record data. Access to the data requires that the user have:

- ⇨ A DOEInfo User ID and password and
- ⇨ Be authorized to have SF-7 access privileges.

Users who do not already have a DOEInfo User ID and password **should submit an electronic access request via the DOEInfo Home Page.**

- ⇨ Using your Internet browser, open the following web address:
  http://mis.doe.gov/doeinfo/
- ⇨ When the DOEInfo Home Page appears, you may wish to bookmark or save this address as a favorite.
- ⇨ At the bottom of the DOEInfo home page, click on the purple button labeled "ACCESS REQUEST".
- ⇨ Carefully follow the instructions to request access.
- ⇨ Complete the access form, making sure to check the box by the role of SF-7 GLOBAL. In the comments box, please indicate your position and state your requirement to access the SF-7 as part of your official duties. While you are requesting access for SF-7, you may desire to request either Personnel Office or Resource Manager roles for your organization as well.
- ⇨ Press the submit button at the bottom of the form.
- ⇨ You will receive notification of your User ID and password within 24 hours.

Users who already have a DOEInfo User ID and password **but require the additional privilege authorization to access the SF-7 data should also submit an electronic access request.**

- ⇨ Follow the instructions listed above. Your previously approved access request will appear and your current access roles will be checked. At step 5, check the box by the role of SF-7 Global. Please do not uncheck previously authorized roles. In the comments box, enter a brief statement indicating your **requirement for SF-7 access.**

USING THE SF-7 EMPLOYEE SERVICE RECORD WEB APPLICATION:
Once you receive your DOEInfo User ID and password and have been authorized access privileges to the SF-7 data, you will be able to access the SF-7 Employee Service Record Request web application. You currently have two methods of navigating to the SF-7 Employee Service Record Request page. From the DOEInfo home page, http://doeinfo.doe.gov, you may click on the lower right hand button labeled "Applications," then select SF-7 option from the next page.

A quicker method is to set a bookmark or favorite in your web browser that will take you directly to the site. To do so:

- ⇨ Open the following web address:
  http://doeinfo.doe.gov/pers/s(+)/

- ⇨ Once the Employee Service Record Sign-In page appears, set your browser bookmark or favorite. This will allow you a method to quickly navigate to this web page in the future. Instructions for using this web application are provided on each page. Please note the special printing instructions regarding browser font size settings and page breaks. Also, if you desire to print only the first page of the SF-7, which contains data that may particularly be needed to process death cases, for preparing retirement calculations, and other HR functions, you may do so by selecting 'FILE' on your browser menu bar, then click on PRINT, and depending on your browser just request page 1 or the current page to be printed.

You should be aware that any version browser will provide you the ability to access the SF-7 application and print Employee Service Records. However, printed pages may not properly page break with older version browsers. Either Netscape Navigator 4.0 or Microsoft Internet Explorer 4.0 are highly recommended to assure better printing results.

Should you have any questions, please feel free to contact Frank Casaleno at (301) 903-3529 or via internet at frankcasaleno@hq.doe.gov.

12.2 Microsoft Access Automated SF-50

Below are step by step instructions on downloading and using the Microsoft Access Database and instructions to generate SF-50's that are not able to be produced within CHRIS. To utilize this program you must have Microsoft Access 97 or higher version.

Downloading the Database and Instructions:

- ⇨ From the CHRIS Home page (http://chris.inel.gov) click on CHRIS HR/TR USERS.
- ⇨ Locate and click on the bullet entitled "Forms & Benefits".
- ⇨ Under Standard Forms there is a bullet which contains the link "Microsoft Access Automated SF-50" with the instruction to right click on the link and download the database file. You may wish to set up a separate directory on your computer to download this file to and use this directory to store saved versions of the SF-50's you create over time. Save the database file to your hard drive. The database name (SF-50.mdb) is the default database name.
- ⇨ Open Microsoft Access 97 (or higher version) and select the database you have saved to your hard drive.
- ⇨ Follow the same procedure to download the "Instructions for Microsoft Access Automated SF-50" and print them to refer to as needed.

Using the Database:

- ⇨ Once the database is opened, you will see a series of option buttons across the top and a blank form for your use. You may fill in the form in any order you care to, however, the tab key is set up to take you from field to field in numerical order within the form.
- ⇨ Date fields within the form are designed to have the century used in them.
- ⇨ The "*From: Position Title and Number*" and the "*To: Position Title and Number*" (blocks 7 and 15) are designed so that you may enter the position title, PD Number and Position Number as necessary. While the information may scroll from view, it will all print on the SF-50. Once in these fields, use the enter key to move to a new line. Using the up and down arrow keys will allow you to scroll through the field.
- ⇨ You will see that the Total Salary fields (blocks 12 and 20) are grayed out. These fields will automatically calculate and populate based on the salary information that you provide in the Basic Pay (blocks 12A and 20A), Locality Pay (blocks 12B and 20B) and the Other Pay (blocks 12D and 20D).
- ⇨ The Name and Location of Position's Organization fields (blocks 14 and 22) are designed as blocks 7 and 15. Again, while the information may scroll from sight, the information will all print on the SF-50. Use the enter key to move to a new line and the up and down arrow keys to scroll through the field.

- ⇨ Employing Department or Agency (block 46) and Agency Code (block 47) have been auto populated for your convenience, however, these fields are fully editable if you are recreating an SF-50 that would have been generated in another agency.

- ⇨ After you have created your SF-50, you may use any of the large buttons at the top of the screen to preview, print or create/delete SF-50's. An explanation of the use of each of these buttons is in the instructions that you downloaded from the CHRIS web site. When printing an SF-50, you must use the large "Print" button that appears at the top of the form. Any other method of printing will not generate a complete and proper form.

- ⇨ Once you have finished creating the SF-50 and exit the SF-50 is saved to the database and when you come into the database the next time, you are able to access the SF-50's you have created by using the back button at the top of the screen. You also have the option to use the "Save As" feature and save your SF-50 to a separate file.

12.3 Microsoft Access Automated SF-52

Below are step by step instructions on downloading and using the Microsoft Access Database and instructions to generate SF-52's that are not able to be produced within CHRIS. To utilize this program you must have Microsoft Access 97 or higher version.

Downloading the Database and Instructions:

- ⇨ From the CHRIS Home page (http://chris.inel.gov) click on CHRIS USERS.
- ⇨ Locate and click on the bullet entitled "Personnel Forms"
- ⇨ Under Standard Forms there is a bullet which contains the link "Microsoft Access Automated SF-52" with the instruction to right click on the link and download the database file. You may wish to set up a separate directory on your computer to download this file to and use this directory to store saved versions of the SF-52's you create over time. Save the database file to your hard drive. The database name (SF-52.mdb) is the default database name.
- ⇨ Open Microsoft Access 97 (or higher version) and select the database you have saved to your hard drive.
- ⇨ Follow the same procedure to download the "Instructions for Microsoft Access Automated SF-52" and print them to refer to as needed.

Using the Database:

- ⇨ Once the database is opened, you will see a series of option buttons across the top and a blank form for your use. You may fill in the form in any order you care to, however, the tab key is set up to take you from field to field in numerical order within the form.
- ⇨ Date fields within the form are designed to have the century used in them.
- ⇨ The From: Position Title and Number and the To: Position Title and Number (blocks 7 and 15) are designed so that you may enter the position title, PD Number and Position Number as necessary. While the information may scroll from view, it will all print on the SF-52. Once in these fields, use the enter key to move to a new line. Using the up and down arrow keys will allow you to scroll through the field.
- ⇨ The Name and Location of Position's Organization fields (blocks 14 and 22) are designed as blocks 7 and 15. Again, while the information may scroll from sight, the information will all print on the SF-52. Use the enter key to move to a new line and the up and down arrow keys to scroll through the field.
- ⇨ After you have created your SF-52, you may use any of the large buttons at the top of the screen to preview, print or create/delete SF-52's. An explanation of the use of each of these buttons is in the instructions that you downloaded from the CHRIS web site. When printing an SF-52, you must use the large "Print" button that appears at the top of the form. Any other method of printing will not generate a complete and proper form.

Once you have finished creating the SF-52 and exit the SF-52 is saved to the database and when you come into the database the next time, you are able to access the SF-52's you have created by using the back button at the top of the screen. You also have the option to use the "Save As" feature and save your SF-52 to a separate file.

13 CHRIS Terms/Codes

Contents

13.1 CHRIS Action/Reason Code and Nature of Action Combined Crosswalk

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
ADL	Concurrent Appointment	CAR - Career Appointment CCA - Career-Conditional Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 120 - O/S Ltd Appt 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 170 - Exc Appt 171 - Exc Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt
ASC	Intl Assignment Completion	ASC – Intl Assignment Completion	500 - Conv to Career Appt
ASG	Intl Assignment	FEX – Foreign Expatriate Assignment FIN – Foreign Inpatriate Assignment FLA – Foreign Loan Assignment NAT – Third Country National	520 - Conv to O/S Ltd Appt
AWD	Award - Monetary	GNG – Group Gainsharing Award GNS – Individual Gainsharing Award ING - Group Invention Award (Patent) INV – Individual Invention Award (Patent) NBG – Superior Accomplishment/Personal Effort Group Cash Award - NBO-WAPA Only NBO – Superior Accomplishment/Personal Effort Individual Cash Award - NBO-WAPA Only NBS - Superior Accomplishment/Personal Effort Individual Cash Award - NBS-WAPA Only NSG - Superior Accomplishment/Personal Effort Group Cash Award - NBS-WAPA Only OTG - On-The-Spot Group Award OTS - On-The-Spot Individual Award PAW – SES Performance Award PCA – Performance Rating Cash Award RNK – SES Rank Award SCA - Superior Accomplishment/Personal Effort Individual Cash Award SCG - Superior Accomplishment/Personal Effort Group Cash Award SGG – Group Suggestion Award SUG – Individual Suggestion Award TGS - Group Time-Off Suggestion Award TOP - Time-Off Performance Award TOS - Individual Time-Off Suggestion Award TSA - Time-Off Superior Accomplishment/Personal Effort Individual Cash Award TSG - Time-Off Superior Accomplishment/Personal Effort Group Cash Award TSI – Travel Savings Incentive	840 - Individual Cash Award 841 - Group Cash Award 842 - Individual Suggestion/Invention Award 843 - Group Suggestion/Invention Award 845 - Travel Savings Incentive 846 - Individual Time-Off Award 847 - Group Time-Off Award 878 - SES Rank Award 879 - SES Performance Award
BON	Bonus	REC – Recruitment Bonus REL – Relocation Bonus SEP – Separation Incentive RFB – Referral Bonus	815 - Recruitment Bonus 816 - Relocation Bonus 825 - Separation Incentive 848 – Referral Bonus
DEM	Change to Lower Grade	CAO – Change to Lower Grade - CAO CMP – Competitive Selection EMP - At Employee's Request	713 - Change to Lower grade 740 - Position Change 741 - Position Change NTE

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		FPP – Failed Probationary Period ING - RIF - No Grade Retention MIS – Misconduct MSP – MSPB Decision NCS – Issuance of New Class Standards OMB – Resulting from OMB Circular A-76 ORG – Reorganization OTH – Other PLF – Placement in lieu of RIF PSC – Position Change RCL – Resulting from Reclassification RFF - Resulting from RIF RGR - RIF - Grade Retention RPL – Resulting from RPL, CTAP, ICTAP RTN – Change to Lower Grade TTP – Termination of Temporary Promotion USP – Unsatisfactory Performance VRA – VRA Appointment	
DTA	Data Change	B&R - Change Fund Type/B&R Code CAC – Change - Agency Code CAI - Change – Annuitant Indicator CBU - Change – Bargaining Unit CCP - Change/Correct Position Number CDE - Change in Data Element CDP – Correction/Change Department CFC - Change – FLSA Category CJC – Correction/Change-Job Code COC - Change – Occup Code CON – Change in Organization Name CPI - Change – Personnel Office ID CPO - Change – Position Occupied CPR - Change – Pay Rate Determinate CSA – Change in Sub-Agency CSO – Change in Sub-Agency & Org Name CSV – Change in Supervisor CTL – Change in Title DTY - Change in Duty Station DWI - Denial of Within Grade Increase EMP - At Employees Request EXC - Exception to RIF Release FEG - FEGLI Change FLB - Elected Full Living Benefits FTI – From FT to Int FUL - From Part-Time to Full-Time HRS - Change in Hours IFT – From Int to FT IPT – From Int to PT NMC - Name Change NSF – Change/Correct Non-SF-50 Element NTE - Continuance NTE OTH – Other PAR - From Full-Time to Part-Time PLB - Elected Partial Living Benefit PTI – From PT to Int RET - Change in Retirement Plan SCD - Change in SCD STC - Status Change TEN - Change in Tenure Group VET - Change in Veterans Preference	750 - Continuance NTE 755 - Exception to RIF Release 780 - Name Change From 781 - Change in Work Schedule 782 - Change in Hours 792 - Change in Duty Station 800 - Change in Data Element 803 - Change in Retirement Plan 805 - Elected Full Living Benefits 806 - Elected Partial Living Benefits 880 - Change in Tenure Group 881 - FEGLI Change 882 - Change in SCD 883 - Change in Vet Preference for RIF 888 - Denial of WGI 904 – Change Fund Type/B&R Code 927 – Change in Sub-Agency 928 - Change in Sub-Agency & Org Name 929 - Change in Organization Name 933 - Change in Title 966 - Change/Correct Non-SF-50 Element
EXT	Extension of NTE Date	CON - Conversion to Appt NTE EAN - Extension of Appt NTE EEA - Conversion to Exc Appt NTE EFN - Extension of Furlough NTE	515 - Conversion to Appt NTE 571 - Conv to Excepted Appt NTE 760 - Extension of Appt NTE 762 - Extension of SES Limited Appt NTE

Action Code	**Action Description**	**Action/Reason Code**	**Nature of Action/Codes**
		ELP - Extension of LWOP NTE EPC - Extension of Position Change NTE EPN - Extension of Promotion NTE ESE - Extension of SES Limited Appt NTE ETA - Ext of Term Appt NTE EXT - Extension of NTE Date SLG - Assignment to State/Local Gov.	765 – Ext of Term Appt NTE 769 - Extension of Prom NTE 770 - Extension of Position Change NTE 772 - Extension of Furlough NTE 773 - Extension of LWOP NTE
HIR	Hire	ADM – Administrative Accession BRO - Brought into Competitive Service CMP - Competitive Appointment DEM - Change to Lower Grade ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Order Appointment FNA - Foreign National Appointment IPA - Intergovernmental Personnel Act LAT – Lateral MIL – Military NPS - New Position OVS - Overseas Limited Appointment PRO – Promotion RES - Reinstatement Appointment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C, Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN – Trainee VOL - Volunteer Appointment VRA - VRA Appointment XFR - Transfer from Agency ZCL – Change to Lower Grade – CAO ZCV – Conversion to – Appt - CAO ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 – Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 – SES Noncareer Appt 147 – Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-Per 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt NTE 549 – Conv to SES Ltd Emergency Appt NTE 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administration Accession
LOA	Leave Without Pay	EDU – Education FML - Family and Medical Leave Act HEA - Health Reasons MAT - Maternity/Paternity MIL - Military Service OTH – Other	430 - Placement in NonPay Status 460 - LWOP NTE 473 - LWOP - US 480 - Sabbatical NTE

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		PTD - Partial/Total Disability REL - Relocation SAB - Sabbatical NTE SEA - Seasonal SLG - Assignment to State/Local Gov. USH - Unpaid Statutory Holiday	
LOF	Furlough	FUR - Furlough/Furlough NTE RED - Staff Reduction SEA - Seasonal Closure	471 - Furlough 472 - Furlough NTE
LTO	Long Term Disability	LTO - Long Term Disability	460 - LWOP NTE
PAY	Pay Rate Change	ADJ - Adjustment ALD - Change in Allowance/Differential AUO – Begin AUO AUT – Terminate AUO AVP - Availability Pay COL - Cost-of-Living GMW - GM WGI MER - Merit OTH - Other QSI - Quality Step Increase SPG - Step Progression TGR - Termination of Grade Retention WGI - Within Grade Increase	810 - Change in Allowance/Differential 818 - AUO 819 - Availability Pay 850 - MD/DDS Special Pay 855 - Head Nurse Pay 866 - Termination of Grade Retention 867 - Interim WGI 868 - Termination of Interim WGI 891 - GM WGI 892 - Quality Inc 893 - WGI 894 - Pay Adj 895 - Locality Payment 899 - Step Adjustment
PLA	Leave With Pay	PDR – Pending Disability Retirement PTD – Partial/Total Disability SEA – Seasonal	480 – Sabbatical NTE
POS	Position Change	CAO - Position Change – CAO COC – Change in Occupational Code CON – Change in Org Name CSA – Change in Sub-Agency CSO – Change Sub-Agency & Org Name CSV – Change in supervisor EMP - Employee Request FPP - Failed Probationary Period ILR - In Lieu of RIF INA - Position Inactivated JRC - Job Re-Classification NCS - Issuance of New Class Standard NEW - New Position OTH - Other PRO – Promotion REA – Realignment RED – Reorganization REL – Realignment - CAO RIF - Resulting from RIF RSG – Reassignment STA - Position Status Change TTL – Title Change UPD – Position Data Update XFR – Transfer	500 - Conversion to Career Appt 721 – Reassignment 740- Position Change 790 - Realignment 933 – Change in Title
PRO	Promotion	CAO – Promotion - CAO CMP - Competitive Promotion CNT - Conversion to Appointment NTE CNV - Conversion – CAO CPT - Conversion to Appointment ECM - Exception to Competition ECR - Exception to Competition in Lieu of RIF EXC - Promotion Excepted Service FAI - Failure to Receive Proper Consideration NCP - Normal Career Progression NTE - Promotion NTE OTH – Other	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt - PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt - Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career-Cond 542 - Conv to SES Career Appt

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		RFR – Reclassification RPR - Re-Promotion (Exception to Comp) RTL - Removal of Time Limitation UPG – Upgrade	543 - Conv to Reins-SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt NTE 549 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exe Appt 571 - Conv to Exe Appt NTE 590 - Conv to Provisional Appt NTE 702 - Promotion 703 - Promotion NTE
REC	Return from Suspension/Furlough	RTD - Return to Duty	292 - Return to Duty
REH	Rehire	CMP - Competitive Appointment ECA - Expert/Consultant Appointment EMG - Emergency Appointment EXC - Excepted Service Appointment EXO - Executive Level Appointment FNA - Foreign National Appointment IPA - Intergovernmental Personnel Act MIL – Military OVS - Overseas Limited Appointment RES - Reinstatement/Reemployment RRR - Restoration/Reemployment Right SCH - Schedule A, B, C Appointment SES - Senior Executive Service Appt STQ - Appointment Status Quo TMP - Temporary Appointment TRN – Trainee VOL - Volunteer Appointment VRA - VRA Appointment	100 - Career Appt 101 - Career-Cond Appt 107 - Emergency Appt 108 - Term Appt NTE 112 - Term Appt - PER 115 - Appt NTE 120 - O/S Ltd Appt 122 - O/S Ltd Appt NTE 124 - Appt – Status Quo 130 - Transfer 132 - Mass Transfer 140 - Reins-Career 141 - Reins-Career-Cond 142 - SES Career Appt 143 - Reins-SES Cond 145 - Transfer SES Career 146 - SES Noncareer Appt 147 - Transfer SES Noncareer 148 - SES Ltd Term Appt NTE 149 - SES Ltd Emergency Appt NTE 170 - Exc Appt 171 - Exc Appt NTE 190 - Provisional Appt NTE 198 - Interim Appt in Nonduty Status 199 - Interim Appt 500 – Conv to Career Appt 501 – Conv to Career – Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Temp Appt NTE 512 – Conv to Temp Appt-Per 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt NTE 549 – Conv to SES Ltd Emergency Appt NTE 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 997 – Administrative Accession
RET	Retirement	DIS – Disability ERT - Early Retirement (Special Option) ILI - Retired - ILIA Adverse Action MAN – Mandatory	300 - Retirement - Mandatory 301 - Retirement - Disability 302 - Retirement - Voluntary 303 - Retirement - Special Option

Action Code	***Action Description***	***Action/Reason Code***	***Nature of Action/Codes***
		RET – Retired RVL - Retired – Voluntary	304 - Retirement - ILIA
RFL	Return from LWOP	RFL - Return from LWOP	280 - Placement in Pay Status 292 - Return to Duty 293 - Return to Pay Status
STO	Short Term Disability	STD - Short Term Disability	460 - LWOP NTE
SUS	Suspension	DAC - Disciplinary Action DSB - Disorderly Behavior ILA - Illegal Action IND - Suspension – Indefinite NTE - Suspension NTE	450 - Suspension NTE 452 - Suspension - Indefinite
TER	Termination	ADM – Administration Separation ATT – Attendance CHI – Child/House Care CON – Misconduct DEA – Death DIS – Dishonesty DPP – During Probationary/Trial Period DSC – Discharge EES – Dissatisfied w/Fellow Employee ELI – Elimination of Position EXP – Expiration of Appointment FAM – Family Reasons HEA – Health Reasons HRS – Dissatisfied with Hours ILL – Illness in Family INS – Insubordination JOB – Job Abandonment LOC – Dissatisfied with Location LOW – Lack of Work/Funds LVE – Failure to Return from Leave MAR – Marriage MIS – Misstatement on Application MSP – Directed by MSPB MUT – Mutual Consent OTH – Other OTP – Resignation - Other Position PAY – Dissatisfied with Pay PER – Personal Reasons POL – Dissatisfied w/Comp. Policies PRM – Dissatisfied w/Promotion Opps PTD – Partial/Total Disability RAT - Retired from Affiliate RED – Staff Reduction REF – Refused Transfer REL – Relocation RES – Resignation RET – Return to School RIL – Resignation – ILIA RLS – Release RMV – Removal SEC – National Security SUP – Dissatisfied with Supervision TAR – Tardiness TRA – Transportation Problems TYP – Dissatisfied with Type of Work UNS – Unsatisfactory Performance VIO – Violation of Rules VSP – Voluntary Separation Program WOR – Dissatisfied with Work Conditions XFR – Transfer To Agency ZCL – Change to Lower Grade – CAO ZCV – Conv to Appt – CAO	312 - Resignation - ILIA 317 – Resignation 330 - Removal 350 – Death 351 – Termination - Sponsor Relocating 352 – Termination Appt in 353 – Separation - US 355 – Termination - Exp of Appt 356 – Separation - RIF 357 – Termination 385 – Term during prob/trial period 390 – Separation - Appt in 500 – Conv to Career Appt 501 – Conv to Career-Cond Appt 507 – Conv to Emergency Appt 508 – Conv to Term Appt NTE 512 – Conv to Term Appt – PER 515 – Conv to Appt NTE 540 – Conv to Reins-Career 541 – Conv to Reins-Career-Cond 542 – Conv to SES Career Appt 543 – Conv to Reins-SES Career 546 – Conv to SES Noncareer Appt 548 – Conv to SES Ltd Term Appt NTE 549 – Conv to SES Ltd Emergency Appt NTE 570 – Conv to Exc Appt 571 – Conv to Exc Appt NTE 590 – Conv to Provisional Appt NTE 702 – Promotion 703 – Promotion NTE 713 – Change to Lower Grade 721 – Reassignment 740 – Position Change 741 – Position Change NTE 903 – Administration Separation

Action Code	Action Description	Action/Reason Code	Nature of Action/Codes
		ZPC – Position Change – CAO ZPR – Promotion – CAO ZRS – Reassignment – CAO	
XFR	Reassignment/Conversion	CAO - Conv to Appointment - CAO CRM - Competitive Reassignment CTA - Conv to Appointment EER - Employee Request EXC - Exception to Competition FPP - Failed Managerial/Supervisory Period ILR - In Lieu of RIF MRR - Manager Request MSP - MSPB Decision NCS - Issuance of New Classification Standards OMB - Resulting from OMB Circular A-76 PRO - Promotion PSC - Position Change - CAO PSN - Position Change RCA - Reassignment - CAO RCL - Resulting from Reclassification REA - Realignment RIF - RIF RLC - Realignment - CAO ROR - Reorganization ROT - Reassignment (Other) RPL - Resulting from RPL, CTAP, ICTAP SES - Senior Executive Service Appt VRA - VRA Appointment	500 - Conv to Career Appt 501 - Conv to Career-Cond Appt 507 - Conv to Emergency Appt 508 - Conv to Term Appt NTE 512 - Conv to Term Appt – PER 515 - Conv to Appt NTE 520 - Conv to O/S Ltd Appt 522 - Conv to O/S Ltd Appt NTE 524 - Conv to Appt-Status Quo 540 - Conv to Reins-Career 541 - Conv to Reins-Career-Cond 542 - Conv to SES Career Appt 543 - Conv to Reins-SES Career 546 - Conv to SES Noncareer Appt 548 - Conv to SES Ltd Term Appt NTE 549 - Conv to SES Ltd Emergency Appt NTE 570 - Conv to Exc Appt 571 - Conv to Exc Appt NTE 590 - Conv to Provisional Appt NTE 721 – Reassignment 740 - Position Change 741 - Position Change NTE 790 – Realignment

13.2 DOE Personnel Office Identifiers/Sub-Agencies

POI	Description	S/A	Sub-Agency Description
1152	Pittsburgh Naval Reactors Ofc	XL	NNSA, Deputy Administrator for Naval Reactors, PNRO
1231	Schenectady Naval Reactors Ofc	XM	NNSA, Deputy Administrator for Naval Reactors, SNRO
1449	Chicago Operations Office	CH	Chicago Operations Office
1481	Savannah River Operations Ofc	SR	Savannah River Operations Office
1481A	Savannah River Operations Ofc	XK	NNSA-Savannah River Operations Ofc
1609	Idaho Operations Office	ID	Idaho Operations Office
1653	Oak Ridge Operations Office	OR	Oak Ridge Operations Office
1653A	Oak Ridge Operations Office	ST	Office of Science
1653B	Oak Ridge Operations Ofc	XJ	NNSA-Oak Ridge Operations Ofc
1785	Albuquerque Operations Office	AL	Albuquerque Operations Office
1785A	Albuquerque Operations Ofc	XE	NNSA-Albuquerque Operations Ofc
1839	Oakland Operations Office	OO	Oakland Operations Office
1839A	Oakland Operations Ofc	XI	NNSA-Oakland Operations Ofc
1953	Richland Operations Office	RL	Richland Operations Office
2983	Nevada Operations Office	NV	Nevada Operations Office
2983A	Nevada Operations Office	YM	Office of Civilian Radioactive Waste Management, Yucca Mountain Site Characterization Office
2983B	Nevada Operations Ofc	XH	NNSA-Nevada Operations Ofc
4162	National Energy Technology Laboratory	NT	Assistant Secretary for Fossil Energy, National Energy Technology Laboratory
4162A	National Energy Technology Laboratory	AR	Assistant Secretary for Fossil Energy, Albany Research Center
4225B	DOE Headquarters	ED	Office of Economic Impact & Diversity
4225E	DOE Headquarters	EM	Assistant Secretary for Environmental Management
4225F	DOE Headquarters	FE	Assistant Secretary for Fossil Energy
4225G	DOE Headquarters	GC	Office of the General Counsel
4225H	DOE Headquarters	HG	Office of Hearings & Appeals
4225I	DOE Headquarters	EI	Energy Information Administration
4225J	DOE Headquarters	EH	Assistant Secretary for Environment, Safety & Health
4225K	DOE Headquarters	EE	Assistant Secretary for Energy Efficiency & Renewable Energy
4225L	DOE Headquarters	SC	Office of Science
4225N	DOE Headquarters	NE	Office of Nuclear Energy, Science and Technology
4225O	DOE Headquarters	OS	Office of the Secretary of Energy
4225R	DOE Headquarters	RW	Office of Civilian Radioactive Waste Management
4225S	DOE Headquarters	AB	Office of the Secretary of Energy Advisory Board
4225W	DOE Headquarters	WT	Office of Worker and Community Transition
4225X	DOE Headquarters	CI	A/S for Congressional & Intergovernmental Affairs
4225Y	DOE Headquarters	PA	Office of Public Affairs
4225ZB	DOE Headquarters	IN	Office of Intelligence
4225ZC	DOE Headquarters	CN	Office of Counterintelligence
4225ZE	DOE Headquarters	SO	Office of Security and Emergency Operations
4225ZF	DOE Headquarters	OA	Office of Independent Oversight & Performance Assurance
4225ZG	DOE Headquarters	XA	National Nuclear Security Admin (NNSA) - Defense Programs, Defense Nuclear Nonproliferation, Naval Reactors
4225ZK	DOE Headquarters	PI	Assistant Secretary for Policy and International Affairs

POI	Description	S/A	Sub-Agency Description
4225ZL	DOE Headquarters	ME	Office of Management, Budget & Evaluation
4225ZM	DOE Headquarters	IM	Chief Information Office
4236A	WAPA, Denver	WA	Western Area Power Administration
4236B	WAPA-Upper Great Plains Region	WB	Western Area Power Administration
4236G	WAPA, Desert Southwest Region	WG	Western Area Power Administration
4236J	WAPA, Rocky Mountain Region	WJ	Western Area Power Administration
4236L	WAPA, Colorado Rvr Storage Prj	WL	Western Area Power Administration
4236N	WAPA, Sierra Nevada Region	WN	Western Area Power Administration
4281	Office Of Inspector General	IG	Office of Inspector General
4284	Southeastern Power Admin	SE	Southeastern Power Administration
4285	Southwestern Power Admin	SW	Southwestern Power Administration
4291	Strategic Petroleum Res Pro Of	SP	Assistant Secretary for Fossil Energy, Strategic Petroleum Reserve Project Management Office
4294	Rocky Flats Field Office	RF	Rocky Flats Field Office
4298	Ohio Field Office	OH	Ohio Field Office
4327	Golden Field Office	GO	Assistant Secretary for Energy Efficiency & Renewable Energy, Golden Field Office
4327A	Golden Field Office	RS	A/S for Energy Efficiency & Renewable Energy, Regional Offices

13.3 Agency To/From Codes

Code	Description
AB	American Battle Monuments Commission
AF	Department of the Air Force
AG	Department of Agriculture
AH	Nat'l Foundation on the Arts & Humanities
AI	U.S. Institute of Peace
AM	Agency for International Development
AN	African Development Foundation
AP	Appalachian Regional Commission
AR	Department of the Army
AU	Federal Labor Relations Authority
AW	Arctic Research Commission
BD	Merit Systems Protection Board
BF	Defense Nuclear Facilities Safety Board
BG	Pension Benefit Guaranty Corporation
BH	Commission for the Preservation of America’s Heritage Abroad
BJ	Illinois and Michigan Canal National Heritage Corridor Commission
BK	James Madison Memorial Fellowship Foundation
BO	Ofc of Management and Budget
BT	Architectural and Transportation Barriers Compliance
BW	Nuclear Waste Technical Review Commission Board
BZ	Christopher Columbus Fellowship Foundation
CC	Commission on Civil Rights
CE	Council of Economic Advisers
CF	Commission of Fine Arts
CG	National Education Goals Panel
CI	Central Intelligence Agency
CM	Department of Commerce
CT	Commodity Futures Trading Commission
CU	National Credit Union Administration
CX	National Commission on Libraries & Information Sciences
DC	Office of Policy Development
DD	Department of Defense
DJ	Department of Justice
DL	Department of Labor

Code	Description
DN	Department of Energy
EB	Export-Import Bank of the United States
EC	Office of Administration
ED	Department of Education
EE	Equal Employment Opportunity Commission
EM	Federal Emergency Management Agency
EO	Morris K. Udall Scholarship & Excellence in National Environmental Policy
EP	Environmental Protection Agency
EQ	Council on Environmental Quality/Office of Environmental Quality
ES	Commission on Executive, Legislative & Judicial Salaries
EW	Trade and Development Agency
EX	Executive Residence at the White House
FC	Federal Communications Commission
FD	Federal Deposit Insurance Corporation
FI	Federal Financial Institutions Examination Council
FJ	Chemical Safety and Hazard Investigation Board
FK	Farm Credit System Insurance Corporation
FL	Farm Credit Administration
FM	Federal Mediation and Conciliation Service
FQ	Court Services and Offender Supervision Agency for the District of Columbia
FR	Federal Reserve System - Board of Governors
FT	Federal Trade Commission
FW	Office of Special Counsel
FY	Federal Housing Finance Board
GB	Overseas Private Investment Corporation
GE	Barry Goldwater Scholarship & Excellence in Education Foundation
GG	Office of Government Ethics
GI	Presidential Advisory Commission on Holocaust Assets in the U.S.
GJ	Presidio Trust
GS	General Services Administration

Code	Description
GM	Valles Caldera Trust
GW	International Boundary and Water Commission: United States and Mexico
GX	International Boundary Commission: United States and Canada
GY	International Joint Commission: United States and Canada
H5	Federal Energy Regulatory Commission
HB	Committee for Purchase from the People Who are Blind or Severely Disabled
HD	U.S. Holocaust Memorial Museum
HE	Department of HHS
HP	Advisory Council on Historic Preservation
HT	Harry S. Truman Scholarship Foundation
HU	Department of Housing and Urban Development
IB	Broadcasting Board of Governors
IF	Inter-American Foundation
IN	Department of the Interior
JL	Supreme Court of the United States/US Courts
KS	Corporation for National and Community Service
LA	Architect of the Capitol
LB	Botanic Garden
LC	Library of Congress
LD	Congressional Budget Office
LF	Federal Election Commission
LG	General Accounting Office
LL	Congress
LP	Government Printing Office
LQ	John C. Stennis Center for Public Service & Development
LT	U.S. Tax Court
MA	Marine Mammal Commission
MC	Federal Maritime Commission
NF	National Science Foundation
NK	National Council on Disability
NL	National Labor Relations Board
NM	National Mediation Board
NN	National Aeronautics and Space Administration
NP	National CapitSal Planning Commission
NQ	National Archives and Records Administration
NS	National Security Council

Code	Description
NU	Nuclear Regulatory Commission
NV	Department of the Navy
OM	Office of Personnel Management
OS	Occupational Safety and Health
OV	Office of the Vice President
PC	Panama Canal Commission
PI	Public International Organization
PJ	Postal Rate Commission
PO	U.S. Postal Service
PU	Peace Corps
QQ	Office of National Drug Control Policy
RE	Office of Navajo and Hopi Indian Relocation
RF	Federal Retirement Thrift Investment Board
RH	Armed Services Retirement Home
RR	Railroad Retirement Board
RS	Federal Mine Safety and Health Review Commission
SB	Small Business Administration
SE	Securities and Exchange Commission
SK	Consumer Product Safety Commission
SM	Smithsonian Institution
SS	Selective Service System
ST	Department of State
SZ	Social Security Administration
TB	National Transportation Safety Board
TC	U.S. International Trade Commission
TD	Department of Transportation
TN	Office of the U.S. Trade Representative
TR	Department of the Treasury
TS	Office of Science and Technology Policy
TV	Tennessee Valley Authority
UJ	Japan-United States Friendship Commission
UT	Utah Reclamation Mitigation and Conservation Commission
VA	Department of Veterans Affairs
WH	The White House
XX	Bonneville Power Admin
ZD	U.S. Court of Appeals for Veterans Claims
ZG	Office of Compliance
ZL	Medicare Payment Advisory Commission
ZO	Commission on Security and Cooperation in Europe

Code	Description
ZP	U.S. Commission on International Religious Freedom
ZQ	Millennial Housing Commission
ZR	Women's Progress Commeration Commission
ZS	United States - China Security Review Commission
ZT	Commission on Affordable Housing and Health Facility Needs for Senators
ZU	Dwight D. Eisenhowser Memorial Commission

13.4 Pay Plans and Pay Tables in CHRIS

Pay Plan	Pay Table	Description
AD	00E0	WAPA Shift Security Coordinat
AD	00G0	SWAPA Power Dispatchers – AD
AD	00N0	WAPA PowSysDispatch-WA/B/G/J/L
AD	00P0	WAPA PowSysDispatch-WN
AD	00Q0	WAPA Energy Mgmt and Marketing Spec
AD	AD00	Admin. Determined - Per Day
AL	0000	Administrative Law Judges - AL
CA	0000	Board of Contract Appeals
ED	0000	Expert
EF	0000	Consultant
EI	0000	Advisory Committee Mbr.(Other)
EJ	0000	DOE Organization Act
EK	0000	Natl Def Auth Act 1995
EN	0000	NNSA Act
ES	0000	Senior Executive Service
EX	0000	Executive Level
GM	0000	General Schedule - GM No Steps
GM	0137	Actuary - Multiple Areas
GM	0220	Johnston Island
GM	0290	Medical Officer
GM	0329	Engineer Civil
GM	0331	Patent Attorney
GM	0485	Patent Attorney
GM	0499	Medical Officer
GM	999B	Info Tech - Various Locations
GM	999C	Info Tech - Various Locations
GM	999D	Info Tech - Various Locations
GM	999E	Info Tech - Various Locations
GM	999F	Info Tech - SF, OK, San Jose
GS	0000	General Schedule
GS	0012	Spec. Sch. - NY City Clericals
GS	0023	Spec. Sch. - East MA Clericals
GS	0024	Spec. Sch. - Grtr SF Bay Cler.
GS	0029	Spec. Sch. - DC MSA Clericals
GS	0032	Spec. Sch. - DC Math/Stat
GS	0034	Spec. Sch. - NY OnSite Cler
GS	0047	Spec. Sch. - Northern NJ Cler.
GS	0057	Spec. Sch.-Dallas Ft Wrth Cler
GS	0119	Spec. Sch. - Chicago Clericals
GS	0137	Actuary – Multiple Areas
GS	0157	Spec. Sch. - East MA Acct/Aud
GS	0158	Spec. Sch. - Conn. Acct/Aud
GS	0159	Spec. Sch. - Juneau Clericals
GS	0164	Spec. Sch. - DC Metro Acct/Aud
GS	0165	Spec. Sch. - SF Bay Acct/Aud
GS	0173	Spec. Sch. - Albuquerque Nurse
GS	0220	Spec. Sch. - Johnston Island
GS	0263	Spec. Sch. - Chicago Acct./Aud
GS	0268	Spec. Sch.-SF/OKLD Realty Spec
GS	0290	Spec. Sch. - Medical Officer
GS	0304	Spec. Sch. - DC MSA Nurse
GS	0305	Spec. Sch. - Indus. Hygienist
GS	0329	Spec. Sch. - NY City Civil Eng
GS	0331	Spec. Sch.-Dupage Cty-Pat. Att
GS	0349	Spec. Sch.-Los Alamos Clerical
GS	0367	Spec. Sch.-Chicago Realty Spec
GS	0414	Spec. Sch. - Engineers
GS	0415	Spec. Sch. - Petroleum Eng.
GS	0422	Spec. Sch.-Engineer/Electrical
GS	0485	Spec. Sch. - Alameda-Pat. Att.
GS	0491	Spec. Sch.-Law Enforcement Off
GS	0499	Spec. Sch. - Medical Officer
GS	0504	Spec. Sch. - Amarillo Clerical
GS	999A	Info Tech - Outside 48 States
GS	999B	Info Tech - Various Locations
GS	999C	Info Tech - Various Locations
GS	999D	Info Tech - Various Locations
GS	999E	Info Tech - Various Locations
GS	999F	Info Tech - SF, OK, San Jose
SL	0000	Senior Level - SL
ST	0000	Scientific & Professional
WB	SWBC	SWAPA - Wage Board
WB	SWBD	SWAPA - Wage Board
WB	SWCA	SWAPA - Wage Board
WB	SWCB	SWAPA - Wage Board
WB	SWCC	SWAPA - Wage Board
WB	SWDB	SWAPA - Wage Board
WB	SWEA	SWAPA - Wage Board
WB	SWEM	SWAPA - Wage Board
WB	SWFE	SWAPA - Wage Board
WB	SWGA	SWAPA - Wage Board

Pay Plan	Pay Table	Description
WB	SWGB	SWAPA - Wage Board
WB	SWGC	SWAPA - Wage Board
WB	SWHA	SWAPA - Wage Board
WB	SWJA	SWAPA - Wage Board
WB	SWJB	SWAPA - Wage Board
WB	SWJC	SWAPA - Wage Board
WB	SWKA	SWAPA - Wage Board
WB	SWLA	SWAPA - Wage Board
WB	SWMA	SWAPA - Wage Board
WB	SWOA	SWAPA - Wage Board
WB	WPAB	WAPA - Wage Board
WB	WPAE	WAPA - Wage Board
WB	WPAL	WAPA - Wage Board
WB	WPAM	WAPA - Wage Board
WB	WPAN	WAPA - Wage Board
WB	WPAO	WAPA - Wage Board
WB	WPAP	WAPA - Wage Board
WB	WPAQ	WAPA - Wage Board
WB	WPAR	WAPA - Wage Board
WB	WPAS	WAPA - Wage Board
WB	WPAT	WAPA - Wage Board
WB	WPAU	WAPA - Wage Board
WB	WPAV	WAPA - Wage Board
WB	WPAW	WAPA - Wage Board
WB	WPAX	WAPA - Wage Board
WB	WPAY	WAPA - Wage Board
WB	WPAZ	WAPA - Wage Board
WB	WPBA	WAPA - Wage Board
WB	WPBB	WAPA - Wage Board
WB	WPBC	WAPA - Wage Board
WB	WPBD	WAPA - Wage Board
WB	WPBH	WAPA - Wage Board
WB	WPBI	WAPA - Wage Board
WB	WPBJ	WAPA - Wage Board
WB	WPBK	WAPA - Wage Board
WB	WPBL	WAPA - Wage Board
WB	WPBM	WAPA - Wage Board
WB	WPBN	WAPA - Wage Board
WB	WPBO	WAPA - Wage Board
WB	WPBP	WAPA - Wage Board
WB	WPBQ	WAPA - Wage Board
WB	WPBR	WAPA - Wage Board
WB	WPBS	WAPA - Wage Board
WB	WPBT	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPBU	WAPA - Wage Board
WB	WPBV	WAPA - Wage Board
WB	WPCA	WAPA - Wage Board
WB	WPCB	WAPA - Wage Board
WB	WPCD	WAPA - Wage Board
WB	WPCE	WAPA - Wage Board
WB	WPCG	WAPA - Wage Board
WB	WPCH	WAPA - Wage Board
WB	WPCI	WAPA - Wage Board
WB	WPCJ	WAPA - Wage Board
WB	WPCK	WAPA - Wage Board
WB	WPCL	WAPA - Wage Board
WB	WPCN	WAPA - Wage Board
WB	WPCP	WAPA - Wage Board
WB	WPCQ	WAPA - Wage Board
WB	WPCR	WAPA - Wage Board
WB	WPCS	WAPA - Wage Board
WB	WPCV	WAPA - Wage Board
WB	WPCW	WAPA - Wage Board
WB	WPCX	WAPA - Wage Board
WB	WPCY	WAPA - Wage Board
WB	WPCZ	WAPA - Wage Board
WB	WPDA	WAPA - Wage Board
WB	WPDB	WAPA - Wage Board
WB	WPDC	WAPA - Wage Board
WB	WPDE	WAPA - Wage Board
WB	WPDG	WAPA - Wage Board
WB	WPDI	WAPA - Wage Board
WB	WPDK	WAPA - Wage Board
WB	WPDL	WAPA - Wage Board
WB	WPDM	WAPA - Wage Board
WB	WPDN	WAPA - Wage Board
WB	WPDP	WAPA - Wage Board
WB	WPDQ	WAPA - Wage Board
WB	WPDR	WAPA - Wage Board
WB	WPDS	WAPA - Wage Board
WB	WPFA	WAPA - Wage Board
WB	WPFB	WAPA - Wage Board
WB	WPFC	WAPA - Wage Board
WB	WPFD	WAPA - Wage Board
WB	WPFH	WAPA - Wage Board
WB	WPFJ	WAPA - Wage Board
WB	WPFK	WAPA - Wage Board
WB	WPFL	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPFM	WAPA - Wage Board
WB	WPFN	WAPA - Wage Board
WB	WPFO	WAPA - Wage Board
WB	WPFP	WAPA - Wage Board
WB	WPFQ	WAPA - Wage Board
WB	WPFR	WAPA - Wage Board
WB	WPFS	WAPA - Wage Board
WB	WPFT	WAPA - Wage Board
WB	WPFU	WAPA - Wage Board
WB	WPGA	WAPA - Wage Board
WB	WPGB	WAPA - Wage Board
WB	WPGC	WAPA - Wage Board
WB	WPGD	WAPA - Wage Board
WB	WPGE	WAPA - Wage Board
WB	WPGF	WAPA - Wage Board
WB	WPGG	WAPA - Wage Board
WB	WPGI	WAPA - Wage Board
WB	WPHA	WAPA - Wage Board
WB	WPHB	WAPA - Wage Board
WB	WPHC	WAPA - Wage Board
WB	WPHD	WAPA - Wage Board
WB	WPHE	WAPA - Wage Board
WB	WPHF	WAPA - Wage Board
WB	WPHG	WAPA - Wage Board
WB	WPHH	WAPA - Wage Board
WB	WPHI	WAPA - Wage Board
WB	WPHJ	WAPA - Wage Board
WB	WPHL	WAPA - Wage Board
WB	WPHM	WAPA - Wage Board
WB	WPHN	WAPA - Wage Board
WB	WPHO	WAPA - Wage Board
WB	WPHP	WAPA - Wage Board
WB	WPHQ	WAPA - Wage Board
WB	WPHR	WAPA - Wage Board
WB	WPHS	WAPA - Wage Board
WB	WPHT	WAPA - Wage Board
WB	WPHU	WAPA - Wage Board
WB	WPHV	WAPA - Wage Board
WB	WPHW	WAPA - Wage Board
WB	WPHX	WAPA - Wage Board
WB	WPHY	WAPA - Wage Board
WB	WPHZ	WAPA - Wage Board
WB	WPIB	WAPA - Wage Board
WB	WPIC	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPID	WAPA - Wage Board
WB	WPIE	WAPA - Wage Board
WB	WPIF	WAPA - Wage Board
WB	WPIG	WAPA - Wage Board
WB	WPIH	WAPA - Wage Board
WB	WPII	WAPA - Wage Board
WB	WPIJ	WAPA - Wage Board
WB	WPIK	WAPA - Wage Board
WB	WPIL	WAPA - Wage Board
WB	WPIM	WAPA - Wage Board
WB	WPIN	WAPA - Wage Board
WB	WPIO	WAPA - Wage Board
WB	WPIP	WAPA - Wage Board
WB	WPIQ	WAPA - Wage Board
WB	WPIR	WAPA - Wage Board
WB	WPIS	WAPA - Wage Board
WB	WPIT	WAPA - Wage Board
WB	WPIU	WAPA - Wage Board
WB	WPIV	WAPA - Wage Board
WB	WPIW	WAPA - Wage Board
WB	WPIX	WAPA - Wage Board
WB	WPIY	WAPA - Wage Board
WB	WPIZ	WAPA - Wage Board
WB	WPJA	WAPA - Wage Board
WB	WPJB	WAPA - Wage Board
WB	WPJC	WAPA - Wage Board
WB	WPJD	WAPA - Wage Board
WB	WPJE	WAPA - Wage Board
WB	WPJF	WAPA - Wage Board
WB	WPJG	WAPA - Wage Board
WB	WPJH	WAPA - Wage Board
WB	WPJI	WAPA - Wage Board
WB	WPJJ	WAPA - Wage Board
WB	WPJK	WAPA - Wage Board
WB	WPJL	WAPA - Wage Board
WB	WPJM	WAPA - Wage Board
WB	WPJN	WAPA - Wage Board
WB	WPJO	WAPA - Wage Board
WB	WPJP	WAPA - Wage Board
WB	WPJQ	WAPA - Wage Board
WB	WPJR	WAPA - Wage Board
WB	WPJS	WAPA - Wage Board
WB	WPJT	WAPA - Wage Board
WB	WPJU	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPJV	WAPA - Wage Board
WB	WPJW	WAPA - Wage Board
WB	WPJX	WAPA - Wage Board
WB	WPJY	WAPA - Wage Board
WB	WPJZ	WAPA - Wage Board
WB	WPKA	WAPA - Wage Board
WB	WPKB	WAPA - Wage Board
WB	WPKC	WAPA - Wage Board
WB	WPKD	WAPA - Wage Board
WB	WPKE	WAPA - Wage Board
WB	WPKF	WAPA - Wage Board
WB	WPKG	WAPA - Wage Board
WB	WPKH	WAPA - Wage Board
WB	WPKI	WAPA - Wage Board
WB	WPKJ	WAPA - Wage Board
WB	WPKK	WAPA - Wage Board
WB	WPKL	WAPA - Wage Board
WB	WPKM	WAPA - Wage Board
WB	WPKN	WAPA - Wage Board
WB	WPKO	WAPA - Wage Board
WB	WPKR	WAPA - Wage Board
WB	WPKS	WAPA - Wage Board
WB	WPKT	WAPA - Wage Board
WB	WPKU	WAPA - Wage Board
WB	WPKV	WAPA - Wage Board
WB	WPKW	WAPA - Wage Board
WB	WPKX	WAPA - Wage Board
WB	WPKY	WAPA - Wage Board
WB	WPKZ	WAPA - Wage Board
WB	WPLE	WAPA - Wage Board
WB	WPLF	WAPA - Wage Board
WB	WPLG	WAPA - Wage Board
WB	WPLH	WAPA - Wage Board
WB	WPLI	WAPA - Wage Board
WB	WPLJ	WAPA - Wage Board
WB	WPLK	WAPA - Wage Board
WB	WPLL	WAPA - Wage Board
WB	WPLM	WAPA - Wage Board
WB	WPLN	WAPA - Wage Board
WB	WPLO	WAPA - Wage Board
WB	WPLP	WAPA - Wage Board
WB	WPLQ	WAPA - Wage Board
WB	WPLR	WAPA - Wage Board
WB	WPLS	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPLT	WAPA - Wage Board
WB	WPLU	WAPA - Wage Board
WB	WPLV	WAPA - Wage Board
WB	WPLW	WAPA - Wage Board
WB	WPLX	WAPA - Wage Board
WB	WPLY	WAPA - Wage Board
WB	WPLZ	WAPA - Wage Board
WB	WPMA	WAPA - Wage Board
WB	WPMB	WAPA - Wage Board
WB	WPMC	WAPA - Wage Board
WB	WPMD	WAPA - Wage Board
WB	WPME	WAPA - Wage Board
WB	WPMF	WAPA - Wage Board
WB	WPMG	WAPA - Wage Board
WB	WPMH	WAPA - Wage Board
WB	WPOB	WAPA - Wage Board
WB	WPOC	WAPA - Wage Board
WB	WPOF	WAPA - Wage Board
WB	WPOI	WAPA - Wage Board
WB	WPOK	WAPA - Wage Board
WB	WPOL	WAPA - Wage Board
WB	WPOM	WAPA - Wage Board
WB	WPON	WAPA - Wage Board
WB	WPOO	WAPA - Wage Board
WB	WPOP	WAPA - Wage Board
WB	WPOQ	WAPA - Wage Board
WB	WPOR	WAPA - Wage Board
WB	WPOS	WAPA - Wage Board
WB	WPOT	WAPA - Wage Board
WB	WPOV	WAPA - Wage Board
WB	WPOW	WAPA - Wage Board
WB	WPOX	WAPA - Wage Board
WB	WPOY	WAPA - Wage Board
WB	WPOZ	WAPA - Wage Board
WB	WPPA	WAPA - Wage Board
WB	WPPB	WAPA - Wage Board
WB	WPPC	WAPA - Wage Board
WB	WPPD	WAPA - Wage Board
WB	WPPE	WAPA - Wage Board
WB	WPPF	WAPA - Wage Board
WB	WPPG	WAPA - Wage Board
WB	WPPH	WAPA - Wage Board
WB	WPPI	WAPA - Wage Board
WB	WPPJ	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPPK	WAPA - Wage Board
WB	WPPN	WAPA - Wage Board
WB	WPPP	WAPA - Wage Board
WB	WPPQ	WAPA - Wage Board
WB	WPPR	WAPA - Wage Board
WB	WPPS	WAPA - Wage Board
WB	WPPT	WAPA - Wage Board
WB	WPPU	WAPA - Wage Board
WB	WPPV	WAPA - Wage Board
WB	WPPW	WAPA - Wage Board
WB	WPPX	WAPA - Wage Board
WB	WPPY	WAPA - Wage Board
WB	WPPZ	WAPA - Wage Board
WB	WPQA	WAPA - Wage Board
WB	WPQB	WAPA - Wage Board
WB	WPQC	WAPA - Wage Board
WB	WPQD	WAPA - Wage Board
WB	WPQE	WAPA - Wage Board
WB	WPQF	WAPA - Wage Board
WB	WPQG	WAPA - Wage Board
WB	WPQH	WAPA - Wage Board
WB	WPQJ	WAPA - Wage Board
WB	WPQK	WAPA - Wage Board
WB	WPQL	WAPA - Wage Board
WB	WPQM	WAPA - Wage Board
WB	WPQN	WAPA - Wage Board
WB	WPQO	WAPA - Wage Board
WB	WPQP	WAPA - Wage Board
WB	WPQQ	WAPA - Wage Board
WB	WPQR	WAPA - Wage Board
WB	WPQS	WAPA - Wage Board
WB	WPQT	WAPA - Wage Board
WB	WPQU	WAPA - Wage Board
WB	WPQV	WAPA - Wage Board
WB	WPQW	WAPA - Wage Board
WB	WPQX	WAPA - Wage Board
WB	WPQY	WAPA - Wage Board
WB	WPQZ	WAPA - Wage Board
WB	WPRA	WAPA - Wage Board
WB	WPRB	WAPA - Wage Board
WB	WPRC	WAPA - Wage Board
WB	WPRD	WAPA - Wage Board
WB	WPRF	WAPA - Wage Board
WB	WPRG	WAPA - Wage Board
WB	WPRH	WAPA - Wage Board
WB	WPRI	WAPA - Wage Board
WB	WPRJ	WAPA - Wage Board
WB	WPRK	WAPA - Wage Board
WB	WPRL	WAPA - Wage Board
WB	WPRM	WAPA - Wage Board
WB	WPRN	WAPA - Wage Board
WB	WPRO	WAPA - Wage Board
WB	WPRP	WAPA - Wage Board
WB	WPRQ	WAPA - Wage Board
WB	WPRR	WAPA - Wage Board
WB	WPRS	WAPA - Wage Board
WB	WPRT	WAPA - Wage Board
WB	WPRU	WAPA - Wage Board
WB	WPRV	WAPA - Wage Board
WB	WPRW	WAPA - Wage Board
WB	WPRX	WAPA - Wage Board
WB	WPRY	WAPA - Wage Board
WB	WPRZ	WAPA - Wage Board
WB	WPSA	WAPA - Wage Board
WB	WPSB	WAPA - Wage Board
WB	WPSC	WAPA - Wage Board
WB	WPSF	WAPA - Wage Board
WB	WPSG	WAPA - Wage Board
WB	WPSH	WAPA - Wage Board
WB	WPSI	WAPA - Wage Board
WB	WPSJ	WAPA - Wage Board
WB	WPSK	WAPA - Wage Board
WB	WPSL	WAPA - Wage Board
WB	WPSM	WAPA - Wage Board
WB	WPSN	WAPA - Wage Board
WB	WPSO	WAPA - Wage Board
WB	WPSP	WAPA - Wage Board
WB	WPSQ	WAPA - Wage Board
WB	WPSR	WAPA - Wage Board
WB	WPSS	WAPA - Wage Board
WB	WPST	WAPA - Wage Board
WB	WPSU	WAPA - Wage Board
WB	WPSV	WAPA - Wage Board
WB	WPSW	WAPA - Wage Board
WB	WPSX	WAPA - Wage Board
WB	WPSY	WAPA - Wage Board
WB	WPSZ	WAPA - Wage Board
WB	WPUE	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPUF	WAPA - Wage Board
WB	WPUM	WAPA - Wage Board
WB	WPUN	WAPA - Wage Board
WB	WPUO	WAPA - Wage Board
WB	WPUP	WAPA - Wage Board
WB	WPUQ	WAPA - Wage Board
WB	WPUR	WAPA - Wage Board
WB	WPUS	WAPA - Wage Board
WB	WPUT	WAPA - Wage Board
WB	WPUU	WAPA - Wage Board
WB	WPUV	WAPA - Wage Board
WB	WPUW	WAPA - Wage Board
WB	WPUX	WAPA - Wage Board
WB	WPUY	WAPA - Wage Board
WB	WPUZ	WAPA - Wage Board
WB	WPVA	WAPA - Wage Board
WB	WPVB	WAPA - Wage Board
WB	WPVC	WAPA - Wage Board
WB	WPVD	WAPA - Wage Board
WB	WPVE	WAPA - Wage Board
WB	WPVF	WAPA - Wage Board
WB	WPVG	WAPA - Wage Board
WB	WPVH	WAPA - Wage Board
WB	WPVI	WAPA - Wage Board
WB	WPVJ	WAPA - Wage Board
WB	WPVL	WAPA - Wage Board
WB	WPVN	WAPA - Wage Board
WB	WPVO	WAPA - Wage Board
WB	WPVP	WAPA - Wage Board
WB	WPVQ	WAPA - Wage Board
WB	WPVR	WAPA - Wage Board
WB	WPVS	WAPA - Wage Board
WB	WPVT	WAPA - Wage Board
WB	WPVU	WAPA - Wage Board
WB	WPVV	WAPA - Wage Board
WB	WPVW	WAPA - Wage Board
WB	WPVX	WAPA - Wage Board
WB	WPVY	WAPA - Wage Board
WB	WPVZ	WAPA - Wage Board
WB	WPWA	WAPA - Wage Board
WB	WPWB	WAPA - Wage Board
WB	WPWC	WAPA - Wage Board
WB	WPWD	WAPA - Wage Board
WB	WPWF	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPWI	WAPA - Wage Board
WB	WPWK	WAPA - Wage Board
WB	WPWL	WAPA - Wage Board
WB	WPWM	WAPA - Wage Board
WB	WPWN	WAPA - Wage Board
WB	WPWO	WAPA - Wage Board
WB	WPWP	WAPA - Wage Board
WB	WPWQ	WAPA - Wage Board
WB	WPWR	WAPA - Wage Board
WB	WPWS	WAPA - Wage Board
WB	WPWT	WAPA - Wage Board
WB	WPWU	WAPA - Wage Board
WB	WPWV	WAPA - Wage Board
WB	WPWW	WAPA - Wage Board
WB	WPWX	WAPA - Wage Board
WB	WPWY	WAPA - Wage Board
WB	WPWZ	WAPA - Wage Board
WB	WPXB	WAPA - Wage Board
WB	WPXD	WAPA - Wage Board
WB	WPXE	WAPA - Wage Board
WB	WPXF	WAPA - Wage Board
WB	WPXG	WAPA - Wage Board
WB	WPXH	WAPA - Wage Board
WB	WPXI	WAPA - Wage Board
WB	WPXJ	WAPA - Wage Board
WB	WPXK	WAPA - Wage Board
WB	WPXL	WAPA - Wage Board
WB	WPXM	WAPA - Wage Board
WB	WPXN	WAPA - Wage Board
WB	WPXO	WAPA - Wage Board
WB	WPXP	WAPA - Wage Board
WB	WPXQ	WAPA - Wage Board
WB	WPXR	WAPA - Wage Board
WB	WPXS	WAPA - Wage Board
WB	WPXT	WAPA - Wage Board
WB	WPXU	WAPA - Wage Board
WB	WPXV	WAPA - Wage Board
WB	WPXW	WAPA - Wage Board
WB	WPXX	WAPA - Wage Board
WB	WPXY	WAPA - Wage Board
WB	WPYB	WAPA - Wage Board
WB	WPYC	WAPA - Wage Board
WB	WPYD	WAPA - Wage Board
WB	WPYE	WAPA - Wage Board

Pay Plan	Pay Table	Description
WB	WPYF	WAPA - Wage Board
WB	WPYG	WAPA - Wage Board
WB	WPYH	WAPA - Wage Board
WB	WPYI	WAPA - Wage Board
WB	WPYJ	WAPA - Wage Board
WB	WPYK	WAPA - Wage Board
WB	WPYL	WAPA - Wage Board
WB	WPYM	WAPA - Wage Board
WB	WPYN	WAPA - Wage Board
WB	WPYO	WAPA - Wage Board
WB	WPYP	WAPA - Wage Board
WB	WPYQ	WAPA - Wage Board
WB	WPYR	WAPA - Wage Board
WB	WPYS	WAPA - Wage Board
WB	WPYT	WAPA - Wage Board
WB	WPYU	WAPA - Wage Board
WB	WPYV	WAPA - Wage Board
WB	WPYW	WAPA - Wage Board
WB	WPYX	WAPA - Wage Board
WB	WPYY	WAPA - Wage Board
WB	WPYZ	WAPA - Wage Board
WG	0027	Wage Grade - DC Metro Area
WG	0094	Wage Grade - NY City, NY
WG	0113	Wage Grade - Albany, OR
WG	0125	Wage Grade - Nashville, TN
WL	0027	Wage Leader - DC Metro Area
WL	0094	Wage Leader - NY City, NY
WL	0113	Wage Leader - Albany, OR
WL	0125	Wage Leader - Nashville, TN
WS	0027	Wage Supv. - DC Metro Area
WS	0094	Wage Supv. - NY City, NY
WS	0113	Wage Grade - Albany, OR
WS	0125	Wage Supv. - Nashville, TN
ZZ	0000	Consultant (Without Comp.)

13.5 PAR Remarks

Appointment Limitations (Axx)

A01 Appointment is on a seasonal basis; the employee is subject to release to nonpay status and recall to duty to meet workload requirements as a condition of employment in accordance with the attached agreement.

A03 This appointment is intended to continue for 2 years. Upon satisfactory completion of 2-year trial period, you will be noncompetitively converted to career-conditional appointment. If performance is not satisfactory, or you fail to satisfactorily complete program, employment will be terminated.

A04 Appointment is NTE 2 years. Upon satisfactory completion of internship, you may be noncompetitively converted to career or career conditional appointment. If your performance is not satisfactory or if you fail to satisfactorily complete internship, employment will be terminated.

A11 Employment under this appointment must not exceed **** working days a year.

A12 Employment under this and previous appointment must not exceed **** working days a year.

A15 Total compensation during service year may not exceed 40% of salary for GS-3/1; salary increase resulting from a within-grade increase will not count against this limitation.

A17 As a reemployed annuitant, you serve at the will of the appointing officer.

A21 Temporary employees serve under appointments limited to 1-year or less and are subject to termination at any time without use of adverse action or reduction-in-force procedures. A temporary appointment does not confer eligibility to be promoted or reassigned to other positions, or the ability to be noncompetitively converted to career-conditional appointment.

A22 This appointment cannot be renewed. Upon admission to the Bar, you will be eligible for appointment as attorney in accordance with ********** appointment procedures.

A24 Employee informed in advance of the conditions of appointment under the Presidential Management Intern Program.

A25 This action provides relief required by Public Law 101-12, pending final decision of the MSPB.

A30 This appointment does not confer eligibility to be noncompetitively converted to career-conditional or career appointment.

A31 This appointment is intended to continue through completion of education and study-related work requirements. An agency may noncompetitively appoint you to a career or career-conditional appointment within 120 days after satisfactory completion of your educational program and satisfactory completion of at least 640 hours of career-related work experience. The work experience must have been completed prior to or concurrently with the completion of the requirements of your educational program.

Benefits & Leave (Bxx)

B01 Cancelled health benefits.

B02 Elected not to enroll for health benefits.

B03 Ineligible for health benefits.

B04 Ineligible for leave.

B31 Changes SCD from **-**-** to reflect **** days worked under intermittent work schedule.

B32 Changes SCD from **-**-** to reflect excess time in nonpay status during calendar year ****.

B33 Changes SCD from **-**-** to reflect service which has been ruled creditable.

B34 Changes SCD from **-**-** to reflect previously unclaimed service.

B35 Changes SCD from **-**-** because **********.

B36 Changes SCD from **-**-** upon employee's receipt of discharge from uniformed service.

B41 Health benefits coverage will continue as long as you participate in the work-study program if you pay the employee's share of costs. Payment should be made to agency, either when you return to duty or during your nonpay status.

B43 Government share of premium for health benefits coverage will be reduced because you are working part-time. You will have to pay the employee share of the premium plus the difference between what the Government pays for your enrollment and the amount the Government pays for a full-time employee.

B44 Health benefits coverage continues.

B45 You may change your health benefits enrollment within 60 days after the effective date of this action.

B46 SF 2819 was provided. Life insurance coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract).

B47 Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract).

B51 Basic Life insurance coverage and Additional Optional coverage (if elected) are based on the rate of annual salary payable to you as a part-time employee, not the full-time salary rate shown in block 20 of this SF50. However, Basic Life insurance coverage is always at least $10,000.

B52 Ineligible for health benefits until you complete one year of current continuous employment. Then you may elect health benefits for which you will be charged the full premium.

B53 Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract). You are also eligible for temporary continuation of your FEHB coverage for up to 18 months.

B60 Eligible to elect coverage under the Federal Employees Retirement System (FERS) within six months of the effective date of this personnel action. SF 3109 provided to employee.

B61 You appear to be eligible for early deferred retirement benefits at age ****. If you have questions, contact your agency retirement counselor.

B62 You appear to be eligible for immediate MRA + 10 retirement annuity. If you have questions, contact your agency retirement counselor.

B63 Elected to retain coverage under a retirement system for NAF employees.

B66 Health benefits coverage will continue for 18 months unless you elect to cancel coverage. You are liable for the employee share of the premiums for the first 365 days and for 102% of the full subscription charge after 365 days. Payment for coverage after 365 days must be made on a current basis; payment for the first 365 days may be made while you are absent or when you return.

B67 Elected Full Living Benefits on **-**-**. Post-election Basic Insurance Amount is $00.00.

B68 Elected Partial Living Benefits on **-**-**. Post-election Basic Insurance Amount is $**.**. Must elect "no reduction" at retirement.

B69 Employee has assigned ownership of life insurance coverage. Assignment terminates 31 days after separation date unless employee is entitled to continued coverage before that date.

B70 You made a life insurance open enrollment election under Public Law 105-311. Your election will be effective the first day of the pay period beginning on or after April 23, 2000, which immediately follows one in which you were in a pay and duty status.

B71 You must elect to either: (1) terminate your enrollment, or (2) continue it for up to 365 days and agree to pay the premium or incur a debt. If you do not elect to terminate or continue your enrollment, it automatically terminates at the end of the last pay period in which you paid premiums. Contact your servicing Human Resources Office or see FEHB Handbook at http://www.opm.gov/insure for detailed information.

B72 FEGLI coverage continues until your time in nonpay status totals 12 months. Contact your servicing Human Resources Office or see the FEGLI Handbook at http://www.opm.gov/insure for detailed information.

Corrections & Cancellations (Cxx)

C02 Employee found to be ineligible for **** retirement.

C03 Retroactive restoration based on **********.

C04 Retroactive change to intermediate grade based on **********.

C06 Retroactive change to former grade based on **********.

C07 Retroactive change to lower grade based on **********.

C08 Also corrects same item(s) on personnel action **** ********** dated **-**-**.

C09 Also corrects **** ********** effective **-**-**, item ****, to add **********.

C10 Corrects date of separation from **-**-** to avoid a break in service when employee was appointed by **********.

C11 Corrects item **** from **********.

C12 Also corrects same item(s) on all previous actions from **-**-** to **-**-**.

C13 Also corrects **** ********** effective **-**-**, item ****, from **********.

C14 **********.

C15 This notification of personnel action replaces a previously executed one.

C16 This notification of personnel action prepared by **********.

C17 Completes item **** which was omitted.

C18 Corrects item **** to read:

C19 Corrects salary to give employee benefit of higher previous rate of basic pay.

C20 Action cancelled in accordance with OPM letter (or instructions) dated **-**-**. This SF 50 and the SF 50 being cancelled must be retained permanently in the employee's Official Personnel Folder.

C21 Service from **-**-** to **-**-** may be credited for qualification purposes, and for leave accrual and RIF retention purposes, and for **********.

C27 Entitled to back pay under 5 U.S.C. 5596.

C28 Active duty begins **-**-**.

C30 Nature of action and code shown on original action are no longer in use.

Employment Conditions (Exx)

E01 Appointment is indefinite.

E03 Trial period completed.

E04 Initial probationary period completed.

E05 Date for completion of initial probationary (or trial) period has been adjusted to reflect excess time in nonpay status. New completion date is **-**-**.

E06 Date for completion of probationary (or trial) period has been adjusted to reflect credit for service on intermittent work schedule. Estimated completion date is **-**-**.

E07 You will be in tenure group II until you complete the one-year probationary period that began **-**-**; then you will be changed back to tenure group I.

E18 Appointment is subject to completion of one year initial probationary period beginning **-**-**.

E19 Appointment is subject to completion of one year trial period beginning **-**-**.

E21 You are subject to regulations governing conduct and responsibilities of special government employees.

E23 Veteran preference is not applicable to the Senior Executive Service.

E24 Probationary period for SES position is not required.

E25 Subject to satisfactory completion of one year SES probationary period beginning **-**-**.

E37 Satisfactorily completed prescribed training under training agreement. Meets basic qualifications for other positions in this series.

E39 Employee is assigned to worker-trainee developmental position.

E44 Probationary period for supervisory (or managerial) position not required.

E45 Probationary period for supervisory (or managerial) position completed.

E46 Subject to completion of ********** probationary period for assignment to supervisory (or managerial) position beginning **-**-**.

E51 Employee was guaranteed placement rights during probation.

E54 Employee elects to continue appropriate SES provisions under 5 U.S.C. 3392(c).

E56 Qualified for this position only under training agreement. Not eligible for other positions in this series until satisfactorily completes prescribed training.

E58 Appointment is on a provisional basis. You are eligible for retirement coverage and for health benefits and life insurance. If your performance is satisfactory, and you meet all legal, qualifications, and other applicable requirements, you may be converted to a nontemporary appointment before this appointment expires.

Service Credit (Gxx)

G11 Employee paid under 5 U.S.C. chapter 81 from **-**-** through **-**-**. The entire period shall be credited for all rights and benefits based on length of service.

G29 Intermittent employment totaled **** hours in work status from **-**-** to **-**-**.

G30 Intermittent employment totaled **** hours in pay status from **-**-** to **-**-**.

G31 Nonpay time not previously recorded in calendar year **** totaled **** hours.

G33 Service credit for retirement, reduction-in-force, and leave accrual purposes continues for up to a maximum of 6 months in nonpay status per calendar year.

Position Change Actions (Kxx)

K01 Qualification requirements modified because of general OPM amendment.

K02 Qualifications waived per Reg 351.703.

K12 Selected from **********, dated **-**-**.

K13 Removes temporary limitation placed on the last action.

K16 From promotion NTE **-**-**.

K17 Repromotion to grade not above that from which down-graded without personal cause and not at employee's request.

K18 Position is at the full performance level.

K19 Successor position -- employee retained in competitive service.

K20 Full performance level of employee's position is **********.

K23 Result of change in classification standards.

K26 Result of additional duties and responsibilities.

K27 Result of position review.

K38 Promoted (or reassigned) from **********, effective **-**-**.

K43 Result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.

K50 From position change NTE **-**-**.

K55 Based on OPM CEG letter of 9/29/92.

K60 Action is in lieu of RIF separation of employee retained under temporary exception.

Miscellaneous (Mxx)

M01 Appointment affidavit executed **-**-**.

M02 You have reemployment rights for two years in ********** granted under Reg 352.204 and OPM letter of **-**-**.

M04 Under Public Law 96-8, is entitled to continue FEGLI and health benefits. Has reemployment rights in ********** or successor agency upon separation from the Institute, subject to such time period and other conditions as the President may prescribe.

M06 Reason for temporary appointment **********.

M10 OPF maintained by **********.

M20 Action at employee's request.

M23 Continues promotion NTE **-**-**.

M24 Continues position change NTE **-**-**.

M26 Employee was advised of opportunity to file grievance and elected to do so.

M27 Employee was advised of opportunity to file grievance and elected not to do so.

M33 On nonpay status in **********.

M34 On part-time (or intermittent) appointment in **********.

M36 Concurrent employment **********.

M38 Frozen service: **********.

M39 Creditable military service: **********.

M40 Previous retirement coverage: **********.

M42 Approved by ********** on **-**-**.

M44 Employee elected coverage under FERS.

M45 Employee is automatically covered under FERS.

M46 Employee is covered by FERS because of previous election.

M52 Employee declined conversion to the Senior Executive Service and continues under ********** with all associated rights and benefits.

M53 Employee to suffer no loss of, or reduction in, pay, leave, credit for time or service, or performance or efficiency rating.

M58 No SES reinstatement rights.

M60 Information on possible 5 U.S.C. chapter 83, subchapter II, case may be obtained from **********.

M61 Possible 5 U.S.C. chapter 83, subch. II, case.

M62 You have reemployment rights in ********** under 5 U.S.C. 3582 provided separation is no later than ********** after the date of entry on duty in ********** and you apply to this agency within 90 days from date of your separation.

M63 To be placed on ************ reemployment priority list until **-**-**.

M64 You have employment rights in ********** for **** under **********.

M67 Forwarding address:

M71 Reason for placement in nonpay status:

M72 Reason for furlough: **********.

M73 To be furloughed on **-**-** for total of **** hours.

M74 Changes data element(s) in block(s) **********.

M76 Requested, in lieu of annual leave, after declining offer of **********.

M80 Variation under CS Rule 5 approved by OPM on **-**-**.

M81 Code S in block 32 indicates a part-time employee who is job sharing.

M82 Code T in block 32 indicates a seasonal employee, with a part-time work schedule, who is job sharing.

M83 The 3-year limit on eligibility for reinstatement is extended by the period you serve on excepted, SES, term, or temporary appointment.

M85 You are scheduled to work a minimum of **** hours per week; additional hours may be scheduled when needed to complete assignments.

M90 Employee retained, on accrued annual leave NTE **-**-**, past RIF separation date of **-**-** to establish eligibility for **********.

M91 Employee retained on sick leave past RIF separation date of **-**-**.

M92 Employee retained past RIF effective date of **-**-** to **********.

M93 Employee retained under authority of liquidation provisions prior to completion of liquidation on RIF separation date of **-**-**.

Pay in Addition to, or Outside of Salary (Nxx)

N10 To (or expected to) be paid under 5 U.S.C. chapter 81.

N11 Employee is entitled to 45 calendar days of continuation of regular pay under 5 U.S.C., Chapter 81, section 8118.

N12 Expected to be paid under 5 U.S.C. chapter 81 following 45 calendar days COP period.

N20 Severance pay to be resumed by **********.

N21 Severance pay to be recomputed by ***********.

N22 Entitled to $**.** severance pay fund to be paid at the rate of $**.** per week over **** weeks beginning **-**-**.

N23 Not entitled to severance pay.

N24 Severance pay suspended by ********** until termination of this appointment.

N25 Severance pay discontinued. Employee has received **** weeks of severance pay.

N26 Lump-sum payment to cover **** hours ending **-**-**.

N27 Lump-sum payment to be made for any unused annual leave.

N59 OPF retained by **********.

N61 Per Reg 531.203(d)(2)(vi), the rate received solely during period of Interim WGI may not be used to establish highest previous rate.

Pay Rate (Pxx)

P01 Previously employed at **********.

P02 Pay rate fixed to include rate increase due on same date.

P03 Pay rate is subject to upward retroactive adjustment upon verification of prior service.

P04 Superior qualifications appointment made under Reg 531.203(b).

P05 Special rate under 5 U.S.C. 5305.

P06 Pay rate includes within-grade increases or other rate changes to which employee would have been entitled had he or she remained continuously in Federal service.

P08 Annual salary to be reduced by the amount of your retirement annuity and by future cost of living increases.

P09 Pay or step adjusted **-**-** by **********.

P10 Annuity at present is $**.** pa.

P12 Eligibility date for within-grade increase adjusted to reflect excess time in nonpay status. New estimated eligibility date is **-**-**.

P13 Effective date adjusted due to excess time in nonpay status of **** hours.

P14 Work performance is at an acceptable level of competence.

P15 Within-grade increase to step **** denied because your work is not at an acceptable level of competence. You remain at GS ****, step ****.

P16 Met all requirements for WGI to **********, due on **-**-**.

P17 Entitled to retained pay until **-**-**; otherwise, pay would be ***********.

P18 Retained rate period expires **-**-**. Effective **-**-** pay will be $**.**.

P19 Salary includes WGI for which employee became eligible on **-**-**.

P20 Position and pay reflect the following actions effective during employee's absence: **********.

P30 Eligibility date for WGI has been adjusted to reflect credit for service on intermittent work schedule. Estimated eligibility date is **-**-**.

P48 Salary may not be reduced below salary earned immediately prior to SES conversion with any future involuntary action while continuously employed.

P54 Superior qualifications appointment made under 35 CFR 251.42.

P55 Special rate under 35 CFR 251.42.

P70 Salary in block 20 includes retention allowance of $**.**.

P72 Salary in block 20 includes supervisory differential of $**.**.

P73 Block 20 shows the percent of your rate of adjusted basic pay which is paid to you for the substantial, irregular overtime work you perform which cannot be controlled administratively.

P78 Salary in block 12 includes retention allowance of $**.**.

P80 Salary in block 12 includes supervisory differential of $**.**.

P81 Salary in block 20 includes AUO of $**.**.

P82 Salary in block 12 includes AUO of $**.**.

P85 Amount in block 20-B includes the special pay adjustment for law enforcement officers of $**.**.

P90 You are required to submit to the personnel office a copy of any subsequent notice from OPM of any change in your gross annuity rate.

P91 Within-grade increase denied because your work is not at an acceptable level of competence. Your salary does not change.

P92 Salary includes a locality-based payment of ****%.

P93 Special salary rate exceeds the locality rate of pay, so employee receives no locality payment.

P95 Special adjusted rate for law enforcement officers exceeds locality rate of pay, so employee receives no locality payment.

P96 IGA continued rate of pay continues until one of the terminating conditions of 5 CFR 531.703(g) is satisfied--i.e., the employee's duty station is no longer in an interim geographic adjustment area; the employee is no longer in a position covered by a nationwide or worldwide special salary rate; the employee is entitled to a higher rate of pay under another authority; or the employee is reduced in grade.

P97 This action terminates your IGA continued rate of pay.

P98 Salary in block 12 includes availability pay of $**.**.

P99 Salary in block 20 includes availability pay of $**.**.

Employee Reason for Resignation, Retirement, Failure to Relocate or To Accept Reassignment (Rxx)

R19 Reason for resignation: **********

R20 Reason for retirement: to obtain retirement benefits.

R21 Reason for retirement: **********

R22 Employee has elected to receive workers' compensation in lieu of a retirement annuity.

R52 Reason(s) for declination of assignment: **********

R53 Reason(s) for declination of relocation: **********

R55 Refused job offer because **********.

Agency Explanation of Employee's Separation (Sxx)

S20 **********.

S25 Agency finding: **********.

S28 Agency finding: Resigned after receiving written notice on **-**-** of decision to separate for **********.

S29 Agency finding: Resigned after receiving written notice on **-**-** of decision to demote for **********.

S30 Agency finding: Resigned after receiving written notice on **-**-** of decision to suspend for **********.

S31 Agency finding: Resigned after receiving written notice on **-**-** of proposal to separate for **********.

S32 Agency finding: Resigned after receiving written notice on **-**-** of proposal to demote for ***********.

S33 Agency finding: Resigned after receiving written notice on **-**-** of proposal to suspend for **********.

S34 Agency finding: Retired after receiving written notice on **-**-** of decision to separate for **********.

S35 Agency finding: Retired after receiving written notice on **-**-** of decision to demote for **********.

S36 Agency finding: Retired after receiving written notice on **-**-** of decision to suspend for **********.

S37 Agency finding: Retired after receiving written notice on **-**-** of proposal to separate for **********.

S38 Agency finding: Retired after receiving written notice on **-**-** of proposal to demote for **********.

S39 Agency finding: Retired after receiving written notice on **-**-** of proposal to suspend for **********.

S40 Agency finding: Terminated after receiving written notice on **-**-** of proposal to suspend for **********.

S41 Agency finding: Terminated after receiving written notice on **-**-** of proposal to demote for **********.

S42 Agency finding: Terminated after receiving written notice on **-**-** of proposal to separate for **********.

S43 Agency finding: Terminated after receiving written notice on **-**-** of decision to suspend for **********.

S44 Agency finding: Terminated after receiving written notice **-**-** of decision to demote for **********.

S45 Agency finding: Terminated after receiving written notice on **-**-** of decision to separate for **********.

S46 Separated by order of OPM dated **-**-** for violation of CS **********.

S47 Reason(s) for removal: **********

S48 Reason(s) for termination: **********

S49 Reason for suspension: **********.

S51 RIF notice dated: **-**-**.

S54 Offered job(s) of **********.

S56 No reason given by employee for refusing job offer.

S57 Refused extension of appointment.

S58 No other work available.

S65 Resigned during initial appointment probationary period.

S66 Resigned during trial period.

S68 Employee gave no reason for resignation.

S69 Employee gave no reason for retiring.

S73 Separation by order of Merit Systems Protection Board dated **-**-** for ***********.

S74 Agency finding: Resigned after receiving notice of proposed position change as result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.

S75 Agency finding: Resigned after receiving notice of decision on position change as result of failure to satisfactorily complete probationary period for supervisory (or managerial) position.

S77 Suspension to be imposed on **********.

S78 Employee is accompanying a U.S. Government sponsor overseas.

S80 Resigned after receiving notice that within-grade increase would be denied.

S81 Agency finding: Retired after receiving written notice on **-**-** of decision to remove from the SES for **********.

S82 Agency finding: Resigned after receiving written notice on **-**-** of proposed placement out of the SES for ***********.

S83 There is no annuity reduction based on age per 5 U.S.C. 8339(h).

S84 Eligible for an annuity supplement per 5 U.S.C. 8421(a)(2).

Tenure (Txx)

T05 Date for conversion to career tenure has been adjusted to reflect credit for service on intermittent work schedule. Estimated conversion date is **-**-**.

T06 Date for conversion to career tenure has been adjusted to reflect excess time in nonpay status. New conversion date is **-**-**.

T07 Completed service requirement for career tenure from **-**-** to **-**-**.

T08 Service counting towards permanent tenure from **-**-** to **-**-**.

T09 Service counting towards permanent tenure from **-**-**.

T10 Service counting toward career tenure from **-**-**.

T11 Completed one year of current continuous service.

T29 **********.

T30 Reason for retroactive action:

T55 Tenure as used for 5 U.S.C. 3502 is not applicable to the Senior Executive Service.

Retained Grade and Retained Pay (Xxx)

X35 The retained pay plan and grade ********** is equivalent to **********, the position from which reduced.

X36 Grade retention entitlement terminated. No further entitlement to grade or pay retention.

X37 Employee is entitled to retain grade ********** through **-**-**.

X38 On **-**-** employee will be entitled to retain grade of ********** through **-**-** provided the preceding period of grade retention is not terminated earlier.

X39 Employee elected to terminate grade retention entitlement.

X40 Employee is entitled to pay retention.

X41 Salary is 150 percent of maximum rate of grade to which assigned.

X42 Pay retention entitlement terminated.

X43 Expiration of grade retention period as **********.

X44 Rate is step **** of **********, retained grade.

X45 Retained grade will be used to determine employee's pay, retirement and insurance benefits, and promotion and training eligibility.

X46 Action gives employee within-grade increase/quality increase to step **** of **********, retained grade.

X47 Action denies within-grade increase to step **** of employee's retained grade.

X48 Declined offer of **********.

X49 Change to lower grade is for personal cause.

X50 Failed to comply with priority placement program requirements.

X61 Retained grade will not be used for purposes of reduction-in-force.

X62 Action grants within-grade increase in employee's retained grade of **********.

X63 Action denies within-grade increase in employee's retained grade of **********.

X65 Grade retention entitlement is terminated.

For Internal Use in DOE (Yxx)

Y01 Actual paid salary limited to ************ by 5 USC 5308 or other statute.

Y02 Expected to work ********** hours per week.

Y03 Under 5 USC 3111, student volunteer not a federal employee for any purpose other than injury compensation or laws related to tort claims act. Service not creditable for leave accrual or any other employee benefits.

Y04 Under 5 USC 3111, volunteer service provided during period ************* to **********. Total number of hours provided - *********.

Y05 Description of work performed *********************.

Y06 Termination based on expiration of assignment.

Y07 IPA assignment with 50% or more of employee salary reimbursed.

Y08 IPA assignment with less than 50% of employee salary reimbursed.

Y09 Termination based on volunteer's request.

Y10 Salary reflects $*********** supplemental increase granted to insure the new rate range minimum.

Y11 The organization information appearing in items 21 and/or 28 is obsolete; correction will be made as soon as the realignment becomes effective.

Y12 This position is coded **************** for labor management purposes.

Y13 Based on the information contained in the OPF, your SCD has been changed from ***********.

Y14 Travel agreement in effect pursuant to authority 5 USC 5723.

Y15 Travel agreement in effect pursuant to authority 5 USC 5724.
This transportation not for the convenience of the employee.

Y16 Your service to the Department of Energy is appreciated.

Y17 Welcome to the Senior Executive Service at the Department of Energy.

Y18 Action corrects employee's retirement plan in item 30 from "*" in accordance with PL 105-261 dated 10/17/98. New retirement deductions became effective on 10/25/98, however, correction to the retirement plan is retroactive to include all previous actions from **/**/** to **/**/**.

Y19 Accelerated promotion in accordance with DOE-OIG Training Agreement.

Y20 Promotion is NTE *************. Employee informed in advance of the reasons for and the conditions of the promotion.

Y21 Exception to Merit Promotion Plan, ******************.

Y22 Full performance level is *****.

Y23 Date of last equivalent increase **********.

Y24 Action processed to update employee's record to indicate a change in organization name.

Y25 Action processed to update employee's record to indicate a change in sub-agency.

Y26 Action processed to update employee's record to indicate a change in sub-agency and organization name.

Y27 Award granted after employee separated.

Y31 Type of appointment, position, grade and salary remain unchanged.

Y34 Congratulations on your promotion.

Y35 This action suspends the allotment (if any) for labor organization dues.

Y36 This action resumes the allotment (if any) for labor organization dues.

Y43 Belated election to open season under authority of section 846.204(a) of Title 5 CFR.

Y44 Special Rate under Public Law 99-141.

Y45 Pay adjustment reflects a longevity increase of **********.

Y46 Pay adjustment reflects a longevity increase which establishes employee's salary at the maximum for this grade.

Y47 Pay adjustment reflects a quality step increase award of 3 percent approved by administrator on ******************.

Y48 Changed payroll provider.

Y50 May be non-competitively promoted to the full performance, GS-***** when eligible and at management discretion.

Y55 Critical position pay granted under authority of office of management and budget letter of ***********.

Y56 Salary would be ********* in the absence of critical position pay.

Y57 Organization achievement of group goals.

Y58 Employees covered under FERS who withdrew their retirement contributions may never redeposit these funds and the period covered by the refund will not be creditable for purposes of entitlement or computation of your retirement.

Y59 Employee entitled to remote site duty allowance.

Y60 Employment is subject to successful completion of a background investigation. A security clearance is required for continued employment.

Y61 Accelerated promotion in accordance with FPM Letter 300-34.

Y62 Mobility agreement required.

Y63 Payment for travel to duty station from school authorized per Cooperative Education Program agreement.

Y64 Payment for travel to school from duty station authorized per Cooperative Education Program Agreement.

Y65 Technical career program for professional engineers.

Y66 Upward Mobility Program.

Y67 Career Development Agreement.

Y68 Promoted under BPA accelerated training/development plan for entry level engineers.

Y69 Cooperative Education Program

Y70 Federal Junior Fellowship Program

Y71 Apprenticeship Training Program.

Y72 Craftsman Training Program

Y73 Approved by Craft Committee *************.

Y74 Salary in accordance with paragraph ********* of the CPTC agreement.

Y75 Grandfathered senior operations/employee covered with the BPA/CPTC collective bargaining agreement approved December 7, 1979.

Y76 Grandfathered pay rate in accordance with the BPA/CPTC collective bargaining agreement approved March 2, 1989.

Y77 Pay in accordance with BPA Personnel Letter 536-3 dated June 7, 1982.

Y78 This action terminates the allotment (if any) for labor organization dues.

Y79 Appointment is subject to completion of 3-year trial period beginning ***************.

Y80 Action due to correction in SCD as of *********** resulting from retroactive substitution of donated leave received under voluntary leave transfer program for LWOP.

Y81 Should this appointment later be converted to career-conditional under E.O. 12015, co-op work experiences and LWOP up to 22 work days may be creditable toward completing the required one year probationary period for federal employees if it was in the same line of work and in the same agency.

Y82 Employment agreement signed ***********.

Y83 Employee entitled to 15% Duty Officer pay.

Y85 Beginning November 1, 1993, pay plan code "GM" will identify employees covered by the PMRS termination provisions of Public Law 103-89. A GM employee will continue to be paid at his/her current rate of pay and will be eligible for within-grade increases (WGIs). The WGI waiting period begins the day this merit increase is effected.

Y86 Beginning November 1, 1993, pay plan code "GM" will identify employees covered by the PMRS termination provisions of Public Lay 103-89. A GM employee will continue to be paid at his/her current rate of pay and will be eligible for within-grade increases (WGIs). The WGI waiting period begins the day the employee received his/her last equivalent increase.

Y88 I have met the age and service requirement for voluntary early or regular optional retirement and therefore request to retire with a voluntary separation incentive pay effective ****. My decision to retire is entirely voluntary and has not be coerced. I understand that if I retire from my current employment and receive an incentive payment, I will be responsible for repaying the entire incentive payment to the Department of Energy if I am reemployed by the Federal Government or enter into a personnel services contract with the Federal Government in the next 5 years.

Y89 I understand that if I am selected for incentive pay, this statement serves as my commitment to retire, and my agreement to waive any rights to appeal this action to higher administrative authority. I also understand that if I am not selected for an incentive payment I will be notified of this fact and will not be bound by my election to retire.

Y91 This action terminates the employee's coverage under the provisions of the PMRS Termination Act of 1993 and use of the GM pay plan code.

Y95 I request to resign with a voluntary separation incentive pay effective *****. My decision to resign is entirely voluntary and has not been coerced. I understand that if I volunteer to resign from my current employment and receive an incentive payment, I will be responsible for repaying the entire amount of the payment to the Department of Energy if I am reemployed by the Federal Government or enter into a personnel services contract with the Federal Government in the next 5 years.

Y96 I understand that if I am selected for incentive pay, this statement serves as my commitment to resign, and my agreement to waive any rights to appeal this action to higher administrative authority. I also understand that if I am not selected for an incentive payment, I will be notified of this fact and will not be bound by my election to resign.

Y97 Administrative change to accommodate consistent printing of organization structures on SF-50's Department-wide.

Y98 Retained pay restrictions suspended based on FY99 Dispatcher Pay Plan.

Y99 AD Step Increase.

YA1 Reason for furlough: Lack of appropriations for personnel.

YA5 Cancellation action and restoration of the lost pay in accordance with the Secretary of Energy's memorandum entitled "Restoring pay lost during furlough".

YJ1 Entitled to ********** percent COLA in addition to base salary.

YJ2 COLA subject to annual OPM review.

<u>For Internal Use in DOE (Zxx)</u>

Z01 *********.

Z02 *********.

Z03 *********.

Z85 Salary includes a locality increase only, no general increase percentage.

Z86 Salary includes a general increase only - not entitled to locality pay.

Z87 Employee is entitled to a “continued rate” (est. Jan. 1994 under 5 CFR 531.106 or 531.307), which is being increased by the dollar amount of the percentage in the employee’s underlying GS rate.

Z88 Salary includes a retained rate (adjusted by 1/2 of the dollar amount of the increase in the maximum rate of basic pay payable for the grade of the employee's current position) and a locality payment (or other geographic adjustment) for this area.

Z89 Employee's continued rate is terminated because the employee became entitled to a rate that exceeded the continued rate.

Z90 Special Rate for Law Enforcement Officers under Section 403 of Public Law 101-59.

Z91 This action implements an increase in your scheduled rate of pay.

Z92 Salary includes a general increase of *** percent and a locality payment (or other geographic adjustment) applicable in this area.

Z93 Salary includes a GS rate (increased by **** percent) plus a locality payment (or other geographic adjustment) applicable in this area. Employee's underlying special rate, which is used for certain pay administration purposes, also is increased by **** percent.

Z94 Salary includes a special rate increase of **** percent. Employee receives no other adjustment because special rate provides highest pay entitlement.

Z95 Salary includes a law enforcement special rate increase of **** percent and a locality payment (or other geographic adjustment) applicable in this area.

ZZA You have 30 days from the effective date of this SF-50 to register for the Department of Energy's reemployment priority list.

ZZB Ineligible for consideration under the Department of Energy's Reemployment Priority Selection Program.

ZZC Entitled to reemployment priority selection in the Department of Energy. You must apply for specific vacancies within 30 calendar days from the opening date of vacancy announcements. Entitlement under this program expires ***********.

ZZV Eligible to elect coverage under the Federal Employees Retirement System (FERS) within 6 months of the effective date of this personnel action. SF-3109 provided to employee.

13.6 FEGLI Codes

Code	Description
90	Basic + Option B (3x)
A0	Ineligible
B0	Waived
C0	Basic Only
D0	Basic + Option A
E1	Basic + Option C (1x)
E2	Basic + Option C (2x)
E3	Basic + Option C (3x)
E4	Basic + Option C (4x)
E5	Basic + Option C (5x)
F1	Basic + Option A + Option C (1x)
F2	Basic + Option A + Option C (2x)
F3	Basic + Option A + Option C (3x)
F4	Basic + Option A + Option C (4x)
F5	Basic + Option A + Option C (5x)
G0	Basic + Option B (1x)
H0	Basic + Option B (1x) + Option A
I1	Basic + Option B (1x) + Option C (1x)
I2	Basic + Option B (1x) + Option C (2x)
I3	Basic + Option B (1x) + Option C (3x)
I4	Basic + Option B (1x) + Option C (4x)
I5	Basic + Option B (1x) + Option C (5x)
J1	Basic + Option B (1x) + Option A + Option C (1x)
J2	Basic + Option B (1x) + Option A + Option C (2x)
J3	Basic + Option B (1x) + Option A + Option C (3x)
J4	Basic + Option B (1x) + Option A + Option C(4x)
J5	Basic + Option B (1x) + Option A + Option C(5x)
K0	Basic + Option B (2x)
L0	Basic + Option B (2x) + Option A
M1	Basic + Option B (2x) + Option C (1x)
M2	Basic + Option B (2x) + Option C (2x)
M3	Basic + Option B (2x) + Option C (3x)
M4	Basic + Option B (2x) + Option C (4x)
M5	Basic + Option B (2x) + Option C (5x)
N1	Basic + Option B (2x) +Option A + Option C (1x)
N2	Basic + Option B (2x) +Option A + Option C (2x)
N3	Basic + Option B (2x) +Option A + Option C (3x)
N4	Basic + Option B (2x) + Option A + Option C (4x)
N5	Basic + Option B (2x) + Option A + Option C (5x)
P0	Basic +Option B (3x) + Option A
Q1	Basic +Option B (3x) + Option C (1x)
Q2	Basic +Option B (3x) + Option C (2x)
Q3	Basic +Option B (3x) + Option C (3x)
Q4	Basic +Option B (3x) + Option C (4x)
Q5	Basic +Option B (3x) + Option C (5x)
R1	Basic + Option B (3x) + Option A + Option C (1x)
R2	Basic + Option B (3x) + Option A + Option C (2x)
R3	Basic + Option B (3x) + Option A + Option C (3x)
R4	Basic + Option B (3x) + Option A + Option C (4x)
R5	Basic + Option B (3x) + Option A + Option C (5x)
S0	Basic + Option B (4x)
T0	Basic + Option B (4x) + Option A
U1	Basic + Option B (4x) + Option C (1x)
U2	Basic + Option B (4x) + Option C (2x)
U3	Basic + Option B (4x) + Option C (3x)
U4	Basic + Option B (4x) + Option C (4x)
U5	Basic + Option B (4x) + Option C (5x)
V1	Basic + Option B (4x) + Option A + Option C (1x)
V2	Basic + Option B (4x) + Option A + Option C (2x)
V3	Basic + Option B (4x) + Option A + Option C (3x)
V4	Basic + Option B (4x)+Option A + Option C (4x)
V5	Basic + Option B (4x) + Option A + Option C (5x)
W0	Basic + Option B (5x)
X0	Basic + Option B (5x) + Option A
Y1	Basic + Option B (5x) + Option C (1x)

Code	Description
Y2	Basic + Option B (5x) + Option C (2x)
Y3	Basic + Option B (5x) + Option C (3x)
Y4	Basic + Option B (5x) + Option C (4x)
Y5	Basic + Option B (5x) + Option C (5x)
Z1	Basic + Option B (5x) + Option A + Option C (1x)
Z2	Basic + Option B (5x) + Option A + Option C (2x)
Z3	Basic + Option B (5x) +Option A + Option C (3x)
Z4	Basic + Option B (5x) + Option A + Option C (4x)
Z5	Basic + Option B (5x) + Option A + Option C (5x)

13.7 RNO Codes

Code	Description
A	American Indian/Alaskan Native
B	Asian or Pacific Islander
C	Black, not of Hispanic origin
D	Hispanic
E	White, not of Hispanic origin
F	Asian Indian*
G	Chinese*
H	Filipino*
J	Guamanian*
K	Hawaiian*
L	Japanese*
M	Korean*
N	Samoan*
P	Vietnamese*
Q	All Other Asian or Pacific Islanders*
Y	Not Hispanic In Puerto Rico**

*Use these codes only for employees with a Duty Station in Hawaii

**Use this code only for employees with a Duty Station in Puerto Rico

13.8 Education Level Codes/Definitions

Code	Definition
01	**No formal education or some elementary school--did not complete. Elementary school means grades 1 through 8, or equivalent, not completed.**
02	Elementary school completed--no high school. Grade 8 or equivalent completed.
03	Some high school--did not graduate. High school means grades 9 through 12 or equivalent.
04	High school graduate or certificate of equivalency.
05	Terminal occupational program--did not complete. Program extending beyond grade 12, usually no more than three years; designed to prepare students for immediate employment in an occupation or cluster of occupations; not designed as the equivalent of the first two or three years of a baccalaureate degree program. Includes cooperative training or apprenticeship consisting of formal classroom instruction coupled with on-the-job training.
06	Terminal occupational program--certificate of completion, diploma or equivalent. See code 05 above for definition of terminal occupational program. Two levels are recognized: (1) The technical and/or semi-professional level preparing technicians or semiprofessional personnel in engineering and non-engineering fields; and (2) the craftsman/clerical level training artisans, skilled operators, and clerical workers.
07	Some college--less than one year. Less than 30 semester hours or 45 quarter hours completed.
08	One year college. 30-59 semester hours or 45-89 quarter hours completed.
09	Two years college. 60-89 semester hours or 90-134 quarter hours completed.
10	Associate degree. 2-year college degree program completed.
11	Three years college. 90-119 semester hours or 135-179 quarter hours completed.
12	Four years college. 120 or more semester hours or 180 or more quarter hours completed--no baccalaureate (Bachelor's) degree.
13	Bachelor's degree. Requires completion of at least four, but no more than five, years of academic work; includes Bachelor’s degree conferred in a cooperative plan or program that provides for alternate class attendance and employment in business, industry, or government to allow student to combine actual work experience with college studies.
14	Post-Bachelor's. Some work beyond (at a higher level than) the Bachelor's degree but no additional higher degree.
15	First professional. Signifies the completion of academic requirements for selected professions that are based on programs requiring at least two academic years of previous college work for entrance and a total of a least six academic years of college work for completion , e.g., Dentistry (D.D.S.

Code	Definition
	or D.M.D.), Law (LL. B. or J.D.), Medicine (M.D.), Theology (B.D.), Veterinary Medicine (D.V.M.), Chiropody or Podiatry (D.S.C. or D.P.), Optometry (O.D.), and Osteopathy (D.O.).
16	Post-first professional. Some work beyond (at a higher level than) the first professional degree but no additional higher degree.
17	Master's degree. For liberal arts and sciences customarily granted upon successful completion of one (sometimes two) academic years beyond the Bachelor's degree. In professional fields, an advanced degree beyond the first professional but below the Ph.D., e.g., the LL.M.; M.S. in Surgery following the M.D.; M.S.D., Master of Science in Dentistry; M.S.W., Master of Social Work.
18	Post-Master's. Some work beyond (at a higher level than) the Master's degree but no additional higher degree.
19	Sixth-year degree. Includes such degrees as Advanced Certificate in Education, Advanced Master of Education, Advanced Graduate Certificate, Advanced Specialist in Education Certificate, Certificate of Advanced Graduate Study, Certificate of Advanced Study, Advanced Degree in Education, Specialist in Education, Licentiate in Philosophy, Specialist in Guidance and Counseling, Specialist in Art, Specialist in Science, Specialist in School Administration, Specialist in School Psychology, Licentiate in Sacred Theology.
20	Post-sixth year. Some work beyond (at a higher level than) the sixth-year degree but no additional higher degree.
21	Doctorate degree. Includes such degrees as Doctor of Education, Doctor of Juridical Science, Doctor of Public Health, and the Ph. D. (or equivalent) in any field. Does not include the Doctor's degree that is a first professional degree, per code 15.
22	Post-Doctorate. Work beyond the Doctorate.

13.9 Annuitant Indicator Codes

Code	Description
1	Reemployed Annuitant-CSRS
2	Retired Officer
3	Retired Enlisted
4	Retired Officer/Reemployed Annuitant-CSRS
5	Retired Enlisted/Reemployed Annuitant-CSRS
6	CSRS-No Reduction
7	Retired Officer/CSRS-No Reduction
8	Retired Enlisted/CSRS-No Reduction
9	Not Applicable
A	Reemployed Annuitant-FERS
B	Former Annuitant-FERS
C	Retired Officer/Reemplpyed Annuitant-FERS
D	Retired Officer/Former Annuitant-FERS
E	Retired Enlisted/Reemployed Annuitant-FERS
F	Retired Enlisted/Former Annuitant-FERS
G	FERS- No Reduction
H	Retired Officer/FERS-No Reduction
J	Ret Enlisted/FERS-No Reduction

13.10 FERS Coverage Codes

Code	Description
A	Automatically Covered By FERS
E	Elected Coverage Under FERS
N	Not Covered By FERS

13.11 Functional Class Codes

Code	Description
00	Not Applicable
11	Research
12	Research, Contract/Grant Administration
13	Development
14	Test and Evaluation
21	Design
22	Construction
23	Production
24	Installation/Operation/Maintenance
31	Data Collect/Process/Analysis
32	Scientific/Technical Info
41	Standards and Specifications
42	Regulatory Enforcement/Licensing
51	Natural Resource Operations
81	Clinical Practice/Counseling & Ancillary Medical Services
91	Planning
92	Management
93	Teaching/Training
94	Technical Assistance/Consulting
99	Other

Functional Class Code will be used for the following Series only:

GS-000, Miscellaneous Occupations Group	
020	Community Planning

GS-100, Social Science, Psychology, and Welfare Group	
101	Social Science
110	Economist
140	Manpower Research and Analysis
150	Geography
170	History
180	Psychology
184	Sociology
185	Social Worker
190	General Anthropology
198	Archeology

GS-400, Biological Sciences Group	
401	General Biological Sciences
403	Microbiology
405	Pharmacology
406	Agricultural Extension
408	Ecology
410	Zoology
413	Physiology

GS-400, Biological Sciences Group (cont.)	
414	Entomology
430	Botany
434	Plant Pathology
435	Plant Physiology
436	Plant Protection and Quarantine
437	Horticulture
440	Genetics
454	Range Conservation
457	Soil Conservation
460	Forestry
470	Soil Science
471	Agronomy
475	Agricultural Management
480	General Fish and Wildlife Administration
482	Fishery Biology
485	Wildlife Refuge Management
486	Wildlife Biology
487	Animal Science
493	Home Economics

GS-600, Medical, Hospital, Dental, and Public Health Group	
601	General Health Science
602	Medical Officer
610	Nurse
630	Dietician and Nutritionist
631	Occupational Therapist
633	Physical Therapist
635	Corrective Therapist
637	Manual Arts Therapist
638	Recreation/Creative Arts Therapist
639	Educational Therapist
644	Medical Technologist
660	Pharmacist
662	Optometrist
665	Speech Pathology and Audiology
668	Podiatrist
680	Dental Officer
690	Industrial Hygiene
696	Consumer Safety

GS-700, Veterinary Medical Science Group	
701	Veterinary Medical Science

GS-800, Engineering and Architecture Group	
801	General Engineering
803	Safety Engineering
804	Fire Prevention Engineering
806	Materials Engineering
807	Landscape Architecture
808	Architecture
810	Civil Engineering
819	Environmental Engineering
830	Mechanical Engineering
840	Nuclear Engineering
850	Electrical Engineering
854	Computer Engineering
855	Electronics Engineering
858	Biomedical Engineering
861	Aerospace Engineering
871	Naval Architecture
880	Mining Engineering
881	Petroleum Engineering
890	Agricultural Engineering
892	Ceramic Engineering
893	Chemical Engineering
894	Welding Engineering
896	Industrial Engineering

GS-1200, Copyright, Patent, and Trade Mark Group	
1220	Patent Administration
1221	Patent Adviser
1223	Patent Classifying
1224	Patent Examining
1225	Patent Interference Examining
1226	Design Patent Examining

GS-1300, Physical Sciences Group	
1301	General Physical Science
1306	Health Physics
1310	Physics
1313	Geophysics
1315	Hydrology
1320	Chemistry
1321	Metallurgy
1330	Astronomy and Space Science
1340	Meteorology
1350	Geology
1360	Oceanography
1370	Cartography
1372	Geodesy
1373	Land Surveying
1380	Forest Products Technology
1382	Food Technology
1384	Textile Technology
1386	Photographic Technology

GS-1500, Mathematics and Statistics Group	
1510	Actuary
1515	Operations Research
1520	Mathematics
1529	Mathematical Statistician
1530	Statistician
1540	Cryptography
1550	Computer Science

13.12 Handicap Codes

Code	Description
25	Blind in both eyes
24	Blind in one eye
83	Blood diseases
88	Cancer with complete recovery
89	Cancer – Undergoing treatment
57	Chronic prob combinations
49	Chronic problem back
48	Chronic problem hip/pelvis
46	Chronic problem one/both arms
45	Chronic problem one/both feet
44	Chronic problem one/both hands
47	Chronic problem one/both legs
78	Complete paralysis 3 maj mmbrs
73	Complete paralysis both arms
71	Complete paralysis both hands
75	Complete paralysis both legs
76	Complete paralysis lower body
72	Complete paralysis one arm
70	Complete paralysis one hand
74	Complete paralysis one leg
77	Complete paralysis one side
82	Convulsive disorder
16	Deafness ears/clear speech
17	Deafness ears/unclear speech
84	Diabetes
93	Disfigurement face/hands/feet
01	Handicap not identified
06	Handicap Not Listed
15	Hard of Hearing
81	Heart disease with restriction
80	Heart disease/no restrictions
87	Kidney dysfunction

Code	Description
94	Learning disability
22	Loss of peripheral vision
91	Mental or emotional illness
90	Mental retardation
34	Missing both feet or legs
33	Missing both hands or arms
36	Missing hand/arm and feet/legs
35	Missing hand/arm and foot/leg
38	Missing hands/arms & feet/legs
37	Missing hands/arms & foot/leg
28	Missing one arm
29	Missing one foot
27	Missing one hand
32	Missing one leg
04	No handicap*
05	No handicap
68	Partial paralysis 3 major parts
66	Partial paralysis both arms
64	Partial paralysis both hands
65	Partial paralysis both legs
62	Partial paralysis one arm
61	Partial paralysis one hand
63	Partial paralysis one leg
67	Partial paralysis one side
86	Pulmonary/respiratory disorder
92	Severe distortion limbs/spine
13	Severe speech malfunctions
23	Unable to read ordinary print

*To be used only for accessions prior to 10-01-1987.

13.13 LEO Position Codes

Code	Description
5	5USC 5305 LEO
C	D. C. Police Forces
F	Fire Fighter
N	Not Applicable
P	Primary FEPCA
S	Secondary FEPCA
T	NucMatCour, PL 105-261 (Prim)
U	NucMatCour, PL 105-261 (Sec)

13.14 Military Reserve Codes

Code	Description
A	IMA-Air Force*
B	IMA-Army*
C	IMA-Coast Guard*
D	IMA-Marines*
E	IMA-Navy*
F	Selected Reserve - Air Force
G	Selected Reserve - Army
H	Selected Reserve - Coast Guard
I	Selected Reserve - Marine Corps
J	Selected Reserves - Navy
K	Air National Guard
L	Army National Guard
M	IRR - Air Force**
N	IRR - Army**
O	IRR - Coast Guard**
P	IRR - Marine Corps**
Q	IRR - Navy**
S	Standby Reserve - Air Force
T	Standby Reserve - Army
U	Standby Reserve - Coast Guard
V	Standby Reserve - Marine Corps
W	Standby Reserve - Navy
X	Navy Reserve - Merchant Marines
Y	Draft Eligible
Z	Not Applicable

* IMA - Individual Mobilization Augmentees.
** IRR - Individual Ready Reserve.

13.15 Pay Basis Codes

Code	Description
BW	Bi-Weekly
FB	Fee Basis
PA	Per Annum
PD	Per Diem
PH	Per Hour
PM	Per Month
PW	Piece Work
SY	School Year
WC	Without Compensation

13.16 Pay Rate Determinant Codes

Code	Description
0	Regular Rate
2	Saved Rate - Indefinite
3	Retained Pay - Spec Rt Adjust
4	Saved Rate - Other
5	Special & Superior Quals
6	Special Rate
7	Superior Qualifications Rate
A	Retained Grade - Diff Posn
B	Retained Grade - Same Posn
C	Critical Position Pay
E	Rtnd Grd & Spec Rt - Diff Posn
F	Rtnd Grd & Spec Rt - Same Posn
J	Retained Pay - Same Position
K	Retained Pay - Diff Position
M	Continued IGA Pay
P	Preserved IGA Pay
R	Retained Pay - SES Removal
S	Continued SES Basic Pay
T	Below the Minimum Rate
U	Rtnd Grade & Pay - Same Posn
V	Rtnd Grade & Pay - Diff Posn

13.17 Position Occupied Codes

Code	Description
1	Competitive
2	Excepted
3	SES General
4	SES Career Reserved

13.18 Retirement Plan Codes

Code	Description
1	CSRS
2	FICA
4	None
6	CSRS - Special
C	FICA and CSRS (Partial)
E	FICA and CSRS Special (Partial)
K	FERS and FICA
M	FERS and FICA Special
R	FICA and CSRS (Full)
T	FICA and CSRS - Spec (Full)

13.19 Security Clearance Codes

Code	Description
0	Not Required
1	Confidential
2	Secret
3	Top Secret
4	Sensitive Compartmented Info
5	Q Sensitive
6	Q Non-Sensitive
7	L (Atomic Energy Act)
8	Other

13.20 Sensitivity Codes

Code	Description
1	NonSensitive
2	Non-Critical-Sensitive
3	Critical-Sensitive
4	Special-Sensitive
5	Moderate Risk
6	High Risk

13.21 Special Employment Program Codes

Code	Description
00	Not Applicable
10	Welfare to Work
11	Special Exemption to Ceiling
20	Intern Program
21	Completed Intern Program
22	Intern Program - Did Not Finish
30	Tech Ldrshp Dev Prg
31	Tech Ldrshp Dev Prg – Cmp1
32	Tech Ldrshp Dev Prg - Incmp
50	Seasonal New Hire
54	STEP Sch B 213.3202
56	Summer Program Reg. 316.402A
58	VRA/Worker-Trainee
59	Veteran's Readjustment Program
60	DOE Intern Program
61	Vietnam Era Vet
62	SCEP Sch B 213.3202
66	Reemployed Annuitant
67	Special Handicap Appt.
69	Presidential Mgmt Intern
80	SES Candidate Development
83	Upward Mobility Participant
91	Student Volunteer
96	Appt DOE IPA
97	Detail LWOP under IPA
98	NNSA Dual Hat

13.22 Manager Level Codes

Code	Description
2	Supervisor or Manager
4	Supervisor (CSRA)
5	Management Official (CSRA)
6	Leader
7	Team Leader - 2GR
8	All Other Positions

13.23 Tenure Codes

Code	Description
0	None
1	Permanent
2	Conditional
3	Indefinite

13.24 Type of Appointment Codes

Code	Description
10	Career (Competitive Svc Perm)
15	Career-Conditional (Comp Perm)
20	Nonpermanent (Comp NonPerm)
30	Schedule A (Except Svc Perm)
32	Schedule B (Except Svc Perm)
34	Schedule C (Except Svc Perm)
36	Executive (Except Svc Perm)
38	Other (Except Svc Perm)
40	Schedule A (Except Non Perm)
42	Schedule B (Except Non Perm)
44	Schedule C (Except Non Perm)
46	Executive (Except NonPerm)
48	Other (Except NonPerm)
50	Career (Senior Exec Perm)
55	Noncareer (Senior Exec Perm)
60	Limited Term (Senior Exec NonPerm)
65	Limited Emergency (SES Nonperm)

13.25 Veterans Preference Codes

Code	Description
1	None
2	5 Point
3	10 Point Disability
4	10 Point Comp < 30%
5	10 Point Other
6	10 Point 30%+ Comp

13.26 Veterans Status Codes

Code	Description
B	Pre-Vietnam-Era Veteran
N*	Not a Vietnam-Era Veteran
P	Post-Vietnam-Era Veteran
V	Vietnam-Era Veteran
X	Not a Veteran

***Used only for an employee whose accession to the agency's rolls was prior to 10-01-1991.**

13.27 Work Schedule Codes

Code	Description
B	Baylor Plan
F	Full-Time
G	Full-Time Seasonal
I	Intermittent
J	Intermittent-Seasonal
P	Part-Time
Q	Part-Time Seasonal
S	Part-Time Job Sharer
T	Part-Time Seasonal Job Sharer

13.28 Rating Patterns

Pattern/Scale	Number of Summary Levels in Program	Ratings						
		1	2	3	4	5	X	Z
DOE-Department of Energy*	All (A, B, C, D, E, F)	x	x	x	x	x	x	x
OFA-Other Federal Agency*	All (A, B, C, D, E, F)	x	x	x	x	x	x	x
A	**Two**	x		x			x	x
B	Three	x		x		x	x	x
C	Three	x		x	x		x	x
D	Three	x	x	x			x	x
E	Four	x		x	x	x	x	x
F	Four	x	x	x		x	x	x
G	Four	x	x	x	x		x	x
H	Five	x	x	x	x	x	x	x

Ratings:
1=Unsatisfactory/Unacceptable
2=Marginal or Equivalent
3=Fully Successful or Equivalent
4=Highly Successful or Equivalent
5=Outstanding or Equivalent
X=Not Rated
Z=Excluded From Coverage

* "DOE" and "OFA" patterns/scales encompass all official OPM rating patterns and will be used only for historical ratings issued prior to 10/01/97.

13.29 Retention Allowance Percentages

Retention Allowance %	**Earnings Code**
1%	R01
1.5%	R0A
2%	R02
2.5%	R0B
3%	R03
3.5%	R0C
4%	R04
4.5%	R0D
5%	R05
5.5%	R0E
6%	R06
6.5%	R0F
7%	R07
7.5%	R0G
8%	R08
8.5%	R0H
9%	R09
9.5%	R0I
10%	R10
10.5%	R1J
11%	R11
11.5%	R1K
12%	R12
12.5%	R1L
13%	R13
13.5%	R1M

Retention Allowance %	**Earnings Code**
14%	R14
14.5%	R1N
15%	R15
15.5%	R1O
16%	R16
16.5%	R1P
17%	R17
17.5%	R1Q
18%	R18
18.5%	R1R
19%	R19
19.5%	R1S
20%	R20
20.5%	R2T
21%	R21
21.5%	R2U
22%	R22
22.5%	R2V
23%	R23
23.5%	R2W
24%	R24
24.5%	R2X
25%	R25
Pay Period Amount *	R00

***NOTE: If using a percentage will result in the employee exceeding the salary cap, continue to use the pay period dollar amount until further notice.**

13.30 CHRIS Glossary

Important! This glossary is a composite of definitions, terms, and acronyms used within the context of the CHRIS, PeopleSoft HRMS 8.0 for US Federal government processes. It is not intended to replace or change existing statutory, regulatory, or office-specific descriptions or definitions. Please refer to Federal source documents for greater clarification, context and/or specific usage for Federal terms and definitions.

Absence Without Leave (AWOL). Absence without prior approval, a non pay status resulting from an agency determination that it will not grant any type of leave for a period of absence for which the employee did not obtain advance authorization or for which a request for leave has been denied.

Academic Discipline. An employee's major field of study. (Also referenced as Instructional Program and Major)

Accession. A personnel action that results in the addition of an employee to the rolls of an agency.

Account Code. A combination of the fund type and B&R code.

Accredited Education. Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.

Adjusted Basic Pay. The sum of an employee's rate of basic pay, continued rate of pay, locality comparability payment, and/or special pay adjustment for law enforcement officers to which the employee is entitled.

Adverse Action. A personnel action considered unfavorable to an employee, e.g., removal, suspension, furlough, or reduction in grade or pay.

Agency. Any Department or independent establishment of the Federal government that has the authority to hire employees in the competitive, excepted, and senior executive services.

Annuitant. A person who receives an annuity.

Annuitant CSA Number. A unique number assigned by OPM for a retired employee**.**

Annuitant Indicator. A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes are as follows:

1 = Reemployed annuitant - Civil Service/FERS
2 = Retired military officer receiving pay
3 = Retired military non-officer (enlisted) receiving pay
4 = Retired military officer receiving pay and a reemployed annuitant - Civil Service
5 = Retired military non-officer (enlisted) receiving pay and a reemployed annuitant - Civil Service
9 = Not applicable (none of the above)
A = Reemployed Annuitant - FERS
B = Former Annuitant - FERS
C = Retired Officer/Reemployed Annuitant - FERS
D = Retired Officer/Former Annuitant - FERS
E = Retired Enlisted/Reemployed Annuitant - FERS
F = Retired Enlisted/Former Annuitant – FERS

Annuitant Offset Amount. The gross monthly annuity a Federally retired employee receives.

Annuity. A payment made to a retiree (or to the designated survivor) based upon qualifying participation in a Federal retirement program.

Application Server. One or more Unix or Windows NT machines which allow clients to offload performance-sensitive transactions from the client.

Applet. Any small application, but in the context of the Web, the word has come to refer to small Java applications embedded directly in a Web page.

Appropriation Code. The fund type and B&R Code.

Appointing Authority. The basis that authorized the appointing officer to effect personnel actions on an employee.

Appointing Officer. A person having power by law, or by duly delegated authority, to make appointments.

Approving Official. Individual with the delegated authority responsible for signing the action(s) taken on an employee.

AUO (Administratively Uncontrolled Overtime). An increment of up to 25% of basic pay paid on an annual basis for substantial amounts of overtime work that cannot be controlled administratively and that are required on an irregular basis.

Availability Pay. A special form of premium pay fixed at 25% of basic pay (including locality pay) that applies to criminal investigators who are required to work, or be available to work, substantial amounts of unscheduled overtime duty based on the needs of the employing agency. Criminal investigators receiving availability pay are exempt from the minimum wage and overtime pay provisions of the FLSA and may not receive administratively uncontrollable overtime pay.

Award. A special payment to an employee for certain prescribed kinds of activities or accomplishments.

Bargaining Unit. Code used to identify employee’s bargaining unit.

Batch Processes. Background programs in PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records. You run these processes from the Process Scheduler.

Benefit Plan Type. Any category of benefit, such as health, life, or savings.

Benefit Plan. A specific benefit within a plan type. For example, FEGLI life insurance coverage for Basic Life, Options A, B, and C.

Branch of Military Service. Identifies, if any, military service in which the employee served.

Break in Service. The time when an employee is no longer on the payroll of an agency.

Budget Category. Numeric/alpha identification given to each category of positions.

Business Rules. Policies and procedures that govern the flow of work and place controls over how information can be manipulated.

Calculation Rules. Criteria for calculating benefits, including as-of dates for age, service premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.

CAO (Change of Appointment Office). Movement of an employee from the jurisdiction of one appointing officer in an agency to that of another appointing officer in the same agency. This usually involves a move from a position for which one personnel office provides service and maintains records to a position for which another personnel office in the same agency provides service and maintains records.

Career Appointment. Competitive service permanent appointment given to an employee, who has completed 3 substantially continuous, creditable years of Federal service.

Central Personnel Data File (CPDF). Three types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) and Organizations covering a range of employee personnel/payroll data.

Certificate. A list of eligibles taken from an OPM register and submitted to an appointing officer for employment consideration.

Certification. The process by which the OPM, or an agency office with delegated examining authority, submits certificates to appointing officers.

Change-To-Lower Grade. (1) For positions under the General Schedule or under the same Wage Grade schedule, a change-to-lower grade changes the employee to a lower grade; and (2) When both the old and new positions are under the same type ungraded wage schedule or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.

CHRIS. The U.S. Department of Energy's official personnel system of record is called (CHRIS) Corporate Human Resource Information System. DOE's HR homepage on the web is also known as CHRIS.

Citizenship Code. Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are: (1) Citizen and (2) Other.

Civilian Retiree. A person who has retired from Federal Government civilian employment under a Federal Government-administered retirement system.

Class or Class of Positions. All positions that are sufficiently similar in (1) kind or subject matter or work, (2) the level of difficulty and responsibility, and (3) the qualification requirements for the work, to warrant similar treatment in personnel and pay administration.

Classify. To evaluate the duties and responsibilities of a position and assign a title, occupation series and grade.

Client. Primary user application workstation.

CFR. The Code of Federal Regulations.

Combined Federal Campaign (CFC). A vehicle used by Federal employees to contribute to a charity or charities of their choice.

Commercial-Off-The-Shelf (COTS). Equipment or software that is currently sold commercially to at least one customer.

Competitive Appointment. An appointment to a position in the competitive service following open competitive examination or under direct-hire authority. The competitive examination, that is open to all applicants, may consist of a written test, an evaluation of an applicant's education and experience, and/or an evaluation of other attributes necessary for successful performance in the position to be filled.

Competitive Area. For reduction-in-force, that part of an agency within which employees are in competition for retention. Generally, it is restricted by what is considered a "local commuting area."

Competitive Level. A level for reduction-in-force consists of all jobs in a competitive area which are so similar in all important respects that the agency can readily move an employee from one to another without significant training and without loss of productivity.

Competitive Service. All positions as defined by 5 USC 2102 in the Executive Branch of the Federal government are in the competitive service unless they are specifically excluded from it. Positions in the Legislative and Judicial Branches are outside of the competitive service unless they are specifically included.

Competitive Status. Basic eligibility for noncompetitive assignment to a competitive position. A person on a career or career-conditional appointment acquires competitive status upon satisfactory completion of a probationary period.

Computer Aided Software Engineering (CASE). A set of tools to help application developers complete software development or modification more quickly and accurately.

Consultant. One who serves in an advisory capacity to an officer or instrumentality of the government.

Consultant Position. A position requiring the performance of purely advisory or consultant services, not including the performance of operating functions.

Conversion. The changing of an employee from one appointment to another appointment in the same agency without a break in service of more than 3 calendar days.

Cost-Of-Living Allowance (COLA). An additional allowance payable to an employee at a location in a non-foreign area where living costs are substantially higher than those in the Washington, DC area.

Coverage. An employee's chosen benefit plan and coverage level; that is, what sort of benefit is provided as well as the value.

Creditable Military Service. The total number of years and months of military service that is creditable for annual leave accrual purposes.

Current Year. PeopleSoft term that refers to event maintenance processing.

Data Field. One particular field of information in an internal or external database.

Data Row. Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.

Database. A collection of data organized for rapid search and retrieval.

Database Server. Primary data storage and processing.

Date Classified. Date the Position Description is classified by the Personnel Office.

Date Eligible to Retire. Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.

Default. A standard value that populates a field unless another value is entered.

Demotion. (See Change to Lower Grade).

Denial of Within Grade Increase. The decision to withhold (not grant) a within grade increase to a GS/GM employee because of a determination that the employee's performance is not at an acceptable level of competence.

Department Code. The identification of the Organization code and its description.

Detail. A temporary assignment to a different position for a specified period when the employee is expected to return to his/her regular duties at the end of the assignment. This employee is considered for pay and strength count purposes to be permanently occupying his/her regular position. Unless the agency chooses to use an SF-50, a detail is documented with an SF-52.

Detail Tree. A tree that employs ranges of detail values under each node; you must manually specify the detail values.

Dialog Box. A small window/box that appears and prompts for data.

Direct Hiring Authority. OPM approved agency recruiting plans, which expedite recruitment of persons for appointment to positions in shortage occupations.

Disability Retirement Pay. (from a uniformed service) Money paid by a uniformed service for disability incurred in or the proximate result of performance of active duty.

Disabled Veteran. A person who was separated under honorable conditions from active duty in the Armed Forces performed at any time and who has established the present existence of a service-connected disability or is receiving compensation, disability retirement benefits, or pension because of a public statute administered by the Department of Veterans Affairs or a military department.

Dual Compensation. Payment for more than one civilian office involving a total of more that 40 hours a week.

Duty Location. (use definition from GPPA)

Dynamic Tree. Tree that takes its detail values—Dynamic Details—directly from a table in the database, rather than from a range of values entered by the user.

Earnings. Amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, annual/sick leave, and any other authorized pay.

Earnings Code. A code to define additional earnings based on authority and regulations of said position. (e.g., retention allowance, supervisory differential, AUO, availability pay, standby premium, etc.)

Effective Date. A method of dating information in your system. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect.

Employee Record Number. Number of actions done on an employee.

Entry on Duty Date (EOD). The date on which a person completes the necessary paperwork and is sworn in as an employee.

Error Message. A short message used in identifying what specific requirements were not met in order for an action to be processed.

Ethnic Group. A code that identifies the employee’s basic racial and national origin category.

Event Maintenance. Management of ongoing enrollments during a plan year. Changes involving maintenance include new hires and re-hires, terminations, family status changes, and changes to benefits eligibility.

Excepted Service. As defined by 5 USC 2103 and 5 CFR 213, the Excepted Service consists of positions that are not in the competitive service or Senior Executive Service. Excepted service positions have been excepted from the requirements of the competitive service by law, Executive Order or OPM regulation.

Executive Order. A directive issued by the President.

Executive Schedule (EX). Compensation and pay plan used by the Executive Branch of the Federal government. Statutory pay limits are derived from several of the pay levels within this plan and imposed on the General Schedule and other existing pay plans throughout the Federal government.

Expert. A person with excellent qualifications and a high degree of attainment in professional, scientific, technical, or other field.

Fair Labor Standards Act (FLSA). In accordance with this law, positions are identified as being exempt or non-exempt from coverage. Non-exempt positions are covered and overtime worked will be computed at 1+ the normal hourly rate, up to a maximum of 1+ the hourly rate of a GS-10, step 1.

Federal Employees' Compensation Act (FECA). This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

Federal Employees' Group Life Insurance Program (FEGLI). Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).

Federal Employees' Health Benefits (FEHB). Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer's share.

Federal Employees' Pay Comparability Act (FEPCA). This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

Federal Holidays. The following ten holidays are observed as non-work days; without loss of pay or charge to leave:

1. New Year’s Day - January 1
2. Martin Luther King’s Birthday - Third Monday in January
3. President’s Day - Third Monday in February
4. Memorial Day - last Monday in May
5. Independence Day - July 4
6. Labor Day - First Monday in September
7. Columbus Day - Second Monday in October
8. Veterans Day - November 11
9. Thanksgiving Day - Fourth Thursday in November
10. Christmas Day - December 25

Federal Insurance Compensation Act (FICA). Employee and employer contributions to Social Security.

Federal Wage System. The job-grading and pay system that applies to most trade, craft, and labor positions in agencies subject to 5 USC 5342. Pay is adjusted according to the rates paid by private industry for similar jobs in the same area.

FEGLI Living Benefits Act. Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of $1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

File Server. Central shared resources for client workstations.

Foreign Education. Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

Frozen Service. The total number of years and months of civilian and military service that is creditable in a CSRS component of a FERS employee.

Full Position Management. The choice CHRIS has made to drive our human resource system. Therefore, the position-related fields are grayed (unchangeable) in several of the Administer Workforce pages.

Full-Time Work Schedule. A full-time work schedule requires most employees to work 40 hours during the workweek.

Furlough. The placement of an employee in a temporary nonpay status and nonduty status (or absence from duty) because of lack of work or funds or for other nondisciplinary reasons.

Gender. Used to indicate gender.

General Schedule (GS). The GS graded pay system established under the Classification Act of 1949, as amended.

GM Within Grade Increase. An agency awarded increase in basic rate of pay, with no change in grade, to an employee who is covered under the PMRS termination provisions of PL 103-89.

Grade. A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.

Grade Retention Entitlement. The right of an employee to retain for 2 years, for pay and benefits purposes, the grade of the position from which he/she was reduced.

Graduate Education. Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.

Graphical User Interface (GUI). An icon-based user interface to a system.

Handicap Code. A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.

Health Benefits Code. An alpha/numeric code that identifies each Health Benefit plan.

Health Benefits Effective Date. Date the health benefit plan goes into effect or the effective date of cancellation.

High School Graduation or Equivalent. Applicant has received a high school diploma, General Education Development (GED) equivalency certificate, or proficiency certificate from a State or territorial-level Board or Department of Education.

Incumbent. An employee currently assigned to a position.

Indefinite Appointment. One given a nonpermanent employee who is hired for an unlimited period of time.

Injury Compensation. The compensation and medical care provided to civilian Federal employees for disability due to personal injuries sustained while in performance of duty and due to diseases relating to this employment.

Instructional Program. An employee's major field of study (also referenced as Academic Discipline and major).

Interim Geographic Adjustment (IGA). An additional payment is made when official duty station is in an area where it has been determined that significant pay disparities and recruitment or retention problems exist.

Intermittent Service or Intermittent Employment. Service when an employee works on an irregular basis for which there is no prearranged scheduled tour of duty.

Involuntary Separation. A separation against the will of and without the consent of the employee, other than separation for cause on charges of misconduct or delinquency.

Job Code. Grouping of attributes of like jobs at a high level (one-to-many relationship).

Key. One or more fields that uniquely identifies each row in a table. Some tables contain only one field as the key, while others require a combination.

Last Equivalent Increase (LEI). Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

Last Increase Date. Date of which an employee receive a positive increase in pay.

Law Enforcement Officers (LEOs). Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pay.

Leave - Annual. Leave of absence with pay allowed for personal, emergency, and other purposes.

Leave - Sick. Leave of absence with pay allowed for employees when the employee is physically incapacitated for the performance of duties; receives medical, dental, or optical examination or treatment; or is required to give care and attendance to a member of his/her immediate family who is afflicted with a contagious disease.

Leave Without Pay (LWOP). A temporary nonpay status and nonduty status (or absence from a prescheduled tour of duty) granted at the employee's request.

Life Insurance. The group life, death and accidental dismemberment insurance available to Federal employees.

Locality Adjustment. An interim geographic adjustment, locality-based comparability payment, or special pay adjustment for law enforcement officers.

Major. An employees major field of study (also referenced as Academic Discipline and Instructional Program.

Mass Transfer. The movement of an employee with his/her position to a different agency when (1) a transfer of function or an organization change takes place, and (2) there is no change in the employee's position, grade, or pay.

Menus. List of processes or other program options.

Military Service. Identifies, if any, the branch of military service in which the employee served.

Mode. A system feature that sets the parameters for which records can be viewed or changed by the user.

Module. A unit of application within PeopleSoft covering a specific function with its own forms or pages (i.e. HRMS, Payroll, Benefits Administration, etc.).

MSPB. Merit Systems Protection Board.

National ID (NID). Nine numeric digits assigned to an individual by the Social Security Administration. Also known as Social Security Number (SSN) and Taxpayer Identification Number (TID).

Nature of Action (NOA) Code. Indicates the type of personnel action being processed.

Nature of Action Description. Describes the NOA code.

Nature of Action Effective Date. The date the personnel action is effective.

Noncompetitive Action. An appointment or placement in a position in the competitive service that is not made by selection from an open competitive examination, and that is usually based on current or prior Federal service.

Normal Line of Promotion (Career Ladder). The pattern of upward movement from one grade to another for a position or group of positions in an organization.

Not To Exceed (NTE) Date. Types are as follows:

1. Appointment NTE Date: Indicates the length of time a person may serve in a position.
2. Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
3. Health Benefits Renewal Self-Support NTE: Date when an employee's incapacitated child must be re-evaluated for care under employee's hospitalization coverage.
4. LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
5. Position NTE Date: Indicates the length of time a position is available for use.
6. Promotion NTE Date: Specific time for an increase in grade on a temporary basis.
7. Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

Occupant of Position/Vice. Indicates new position or former occupant of a position.

Occupational Series Code. Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

Official Forwarding Address. An employee's mailing address following separation.

Official Personnel Folder (OPF). The repository of a Federal employee's official documents related to personnel history.

Official Personnel Folder (OPF) Address. Indicates the address where the Official Personnel Folder is maintained.

OMB. Office of Management and Budget.

Open Season. This term has several connotations as it relates to Federal benefits processing. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI or Retirement Plan Changes are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

OPF Code. Indicates where the OPF is maintained.

OPM. Office of Personnel Management.

Organization Codes. A subdivision of an agency to which an employee is assigned.

Organizational Position Title Code. Also known as Working Title.

Outside The Register Appointment. An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitive inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.

Pages. Screens comprised of the fields in which users enter data.

Components. Refers to a group of screens within a PeopleSoft application that contains related information.

PAR. Personnel Action Request.

PAR Status. Where in the process the action is, i.e., requested, approved or processed.

Parallel/Dual Entry. Entry of the same data into more than one (usually two) systems during transition to a new system.

Part-Time Service or Part-Time Employment. Service when employee works on a part-time schedule, less than 40 hours per week, on a prescheduled regular tour of duty.

Part-Time Work Schedule. A schedule that requires an employee to work less than full-time, but for a specific number of hours (usually 16-32 hours per administrative workweek) on a prearranged scheduled tour of duty.

Pay. Types of "pay" are as follows:

1. Basic Pay: generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.
2. Gross Pay: total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).
3. Premium Pay: pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

Pay Adjustment. Any increase or decrease in an employee's rate of basic pay when there is no change in the duties or responsibilities of the employee's position. A pay adjustment may include a change in the step at which the employee is paid. A change in the pay system under which the employees is paid is also a pay adjustment.

Pay Basis. A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee’s pay.

Pay Calculation. Formula that calculates an employee's gross to net.

Pay Calendar. Payroll processing cycle for a given pay group.

Pay Confirmation. Process in which the system updates all to-date cumulative totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.

Pay Frequency. Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.

Pay Group. A set of employees grouped together for payroll processing.

Pay Period. Established times when employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.

Pay Plan. A code that denotes the pay schedule under which an employee is paid, e.g., GS, SL, ST, EJ, WG, etc.

Pay Rate Determinant (PRD). A designation of any special factors that help determine an employee's rate of basic pay or adjusted basic pay.

Pay Retention Entitlement. The right of an employee to retain, under certain circumstances, a rate of basic pay higher than the maximum rate of the grade for the position occupied.

Platform. Database environment that applications run on.

POI. Personnel Office Identifier. Also known as Submitting Office Number (SON). Identifies the Federal civilian personnel office authorized to appoint and separate the employee, and, to the extent such functions have been delegated, to prepare personnel actions, maintain official personnel records, and administer programs for staff compensation, training and development, benefits and awards, and employee and labor relations.

Populate. The term used to describe the appearance of data in a given field.

Position. The officially assigned duties and responsibilities that make up the work performed by an employee.

Position Classification. The analysis and identification of a position and placing it under the position classification plan established by OPM.

Position Change.

1. A move by an employee to another position during the employee's continuous service under the same appointment within the same agency.

   Also,

2. When the employee is entitled to grade retention and moves to another position at or between the retained grade.

Position Date Created. Date the position was created for use in the agency.

Position Description (PD). In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g., supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

Position Number. A number that identifies an authorized position.

Post Differential, Non-Foreign. A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

Post Differential Percent. Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

Post-56 Military Deposit. The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

Premium Pay. Additional pay for overtime, night, holiday, or Sunday work and standby duty or administratively uncontrollable work.

Previous Retirement Coverage. An indicator of whether the employee has, at the time of most recent appointment to the Federal service, previously been covered by the Civil Service Retirement System or the Federal Employees Retirement System.

Probationary Period. The first year of service of an employee who is given a career or career-conditional appointment. During this period, the agency determines the fitness of the employee and the employee has no appeal rights.

Promotion. For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE; or when the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

Provider. An entity that provides one or more of the benefits your agency offers. For example, OPM has oversight authority for the FEHB and FEGLI programs and would be considered a provider. The Thrift Savings Board would be the provider for the Thrift Savings Plan**.**

Quality Step Increase (QSI). A step increase awarded to an employee for sustained high quality performance.

Rate of Basic Pay. The rate of pay fixed by law or administrative action for the position held by an employee before any deductions and exclusive of additional pay of any kind.

Rating Level. (Rating of Record Level). Performance rating prepared at end of annual appraisal period as defined in 5 CFR 430.208 and 5 CFR 430.303.

Rating Pattern. (Rating of Record Pattern). Summary level assigned to performance ratings as defined in 5 CFR 430.208(d) and 5 CFR 430.304(g).

Realignment. The movement of an employee and his/her position when (1) a transfer of function or an organization change occurs, (2) the employee stays in the same agency, and (3) there is no change in the employee's position, grade or pay.

Reassignment. Change of an employee from one position to another without promotion or change to lower grade.

Record Definition. Collection of fields identified in a table and their attributes.

Recruitment Bonus. A one-time payment of up to 25 percent of basic pay to an employee who is newly appointed to a hard-to-fill position.

Reduction In Force (RIF). Separation of an employee from his/her competitive level required by the agency because of lack of work or funds, abolition of position or agency, or cuts in personnel authorizations.

Re-employed Annuitant. A person retired under the Civil Service or Federal Employees Retirement System whose annuity continues after he or she is reemployed by the Federal Government.

Reemployment Priority List. A list of career and career-conditional employees an agency has separated because of (1) reduction-in-force, or (2) compensable injury or disability where recovery takes more than one year from the time the employee began receiving compensation.

Reemployment Rights. The entitlement of an employee to return to nontemporary employment after assignment to other civilian employment.

Reinstatement. Noncompetitive reemployment in the competitive service as a career or career-conditional employee of a person formerly employed in the competitive service who had competitive status or was serving probation when separated.

Related Education. Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position of the occupation, but must be appropriate for the position being filled.

Relational Database. A relational database consists of a series of tables. These tables are made up of rows (horizontal) and columns (vertical), very much like the layout of a spreadsheet. Columns are the fields you see in pages as you work with PeopleSoft applications, and rows contain the entries you make in each field.

Relocation Bonus. A one-time payment of up to 25 percent of basic pay to a current employee who relocates to take a hard-to-fill position.

Remark Codes. Codes that cause the printing of pre-set text passages on a notice of action form. Some passages are general purpose and others are specific to the personnel action being processed.

Resignation. A separation action initiated by the employee to leave the Federal civil/service.

Resignation ILIA. A separation initiated by employee under circumstances that meet the definition of "involuntary separation".

Retained Grade Effective Date. Date employee became eligible or began receiving a retained grade and pay.

Retained Grade Expiration Date. Expiration date of an employee's retained grade and pay.

Retained Rate. A rate of pay above the maximum rate of the employee's grade that an employee is allowed to keep in special situations rather than having his/her rate of basic pay reduced.

Retention Allowance. The annual total dollar amount up to 25 percent of basic pay paid to an essential employee with unusually high qualifications or special skills in those cases where the agency determines that the employee would be likely to leave Federal employment if no allowance were paid.

Retention Register. A record of all employees occupying positions in a competitive level arranged by tenure groups and subgroups, and by service dates within the subgroup. It is used in a reduction-in-force to determine which employees are retained and which are separated or moved to other positions.

Retirement. Separation from the service when employee is eligible to obtain an immediate annuity. Types of retirement are:

1. Mandatory Retirement.
2. Disability Retirement.
3. Voluntary Retirement.
4. Special Option Retirement.
5. ILIA (In Lieu of Involuntary Action) Retirement.

Retirement Coverage Code. A code used to denote an employee's retirement coverage. The major ones include the following:

1. 1-Civil Service (CSRS)
2. K-Federal Employees Retirement System (FERS) and FICA
3. Foreign Service (FS) – Not used in DOE
4. C-CSRS Offset
5. 6-CSRS - Special (for LEOs)
6. M-FERS and FICA - Special
7. 2-Social Security System
8. 4-None

Retirement Deferred. Retirement of a person age 62 or older with at least 5 years of civilian service who was formerly employed under the CSRS and then left Federal service or moved to a position not under a retirement system. An employee covered by FERS who separates after completing 10 years of service can also receive a deferred retirement upon reaching the FERS "Minimum Retirement Age" (55 to 57, depending on birthdate).

Retirement Discontinued Service. Retirement based on involuntary separation against the will and without the consent of the employee, other than on charges of misconduct or delinquency.

Retirement ILIA (In Lieu of Involuntary Action). Voluntary retirement initiated by employee in lieu of involuntary separation by the agency.

Retirement - Optional. Voluntary retirement, without reduction in annuity, of an employee who meets minimum age and service requirements.

Return to Duty. Placement of an employee back in pay and duty status after absence for furlough, suspension, or leave without pay.

Roles. A component of PeopleSoft's workflow functionality. A role is a class of users who perform the same type of work, such as clerks or managers.

Routings. A component of PeopleSoft's workflow functionality. Routings are the system's means of moving information from one place to another, from one step to the next. Routings specify where the information goes and what form it takes **-** i.e., e-mail messages, electronic form, or worklist entry.

Row. A portion of the database also referred to as a record.

Rules. A component of PeopleSoft's workflow functionality. Rules determine what activities are required to process your business data.

Run ID. Code that uniquely identifies a Run Control for batch programs**.**

Sabbatical. An absence from duty, without charge to pay or leave, that an agency may grant to a SES career appointee to engage in study or uncompensated work experience.

Salary. Rate of compensation received by an employee.

Scientific and Professional (ST) Positions. Positions established to carry out research and development functions that require the services of specially qualified personnel. ST positions are ungraded.

Seasonal Employee. An employee who works on an annual recurring basis for periods of less than 12 months (2087 hours) each year.

Self-Service Center. A place where employees go (usually a Web browser-accessed application) that gives them more direct control over their own data to verify, update, and/or request certain personnel actions.

Senior Executive Service. Positions that are classified above GS-15 of the General Schedule or in level IV or V of the Executive Schedule or equivalent positions.

Senior Level (SL) Positions. Positions established to replace positions at grades GS-16, GS-17, and GS-18 of the General Schedule. SL positions are classified above GS-15 of the GS and are ungraded.

Server. Any computer that performs tasks based on a request from a remote client.

Service Computation Date (SCD). The date, either actual or constructed by crediting service, used to determining benefits that are based on how long the person has been in the Federal Service.

Shift. Specific hours during the day that an employee works, such as nine to five, four to eleven, or ten to six.

Shift Code. Numerical shift identifier that is unique within a Set ID.

Shift Differentials. A premium over regular pay for which employees on certain shifts may be eligible, such as double-time for late night shifts. Shift differentials are usually stated as an additional rate or factor.

Sick Leave. Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.

Social Security Number. Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a Taxpayer Identification Number (TIN) and National ID (NID).

Special Salary Rates. Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.

SQL. Structured Query Language **-** a set of commands used to report from, write to, and extract data from relational databases.

SQR. Structured Query Report. A tool used to create a wide variety of reports or to perform global database manipulations and interactive queries.

Standard Form (SF). A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive in usage.

Standard Form (SF-50). Notification of Personnel Action. Used to notify employee and the payroll office, and to record the action in the employee's Official Personnel Folder.

Standard Form (SF-52). Request for Personnel Action. Used by operating officials and supervisors to request personnel actions and to secure internal agency clearances.

Status Position Code. A code that identifies the various conditions of a position, e.g., frozen, classified, etc.

Step. A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

Supervisory Differential. The annual total dollar amount paid to a General Schedule supervisor who provides direct, technical supervision over the work of one or more civilian employees in other pay plans who receive a higher rate of total pay than does the supervisor.

Suspension. Placement of an employee, for disciplinary or other reasons, in a temporary nonpay and nonduty status for disciplinary reasons or other reasons pending an inquiry.

Tables. The structure that establishes the foundation of information in a relational database.

Target Grade. Highest obtainable grade for a position.

Temporary Appointment. An appointment made for a limited period of time and with a specific not-to-exceed (NTE) date determined by the authority under which the appointment is made.

Temporary Continuation of Coverage (TCC). The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.

Tenure. The period of time an employee may reasonably expect to serve under his/her current appointment.

Web Architecture. Where data storage and processing are distributed to process across different systems, such as the Application Server; Web Servers and report repositories which centralizes much of the data processing, thereby eliminating the load upon the individual web browsers.

Thrift Savings Plan (TSP). A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.

Tool Bar. The bar of icons found across the top of every screen.

Tour of Duty. The hours of a day (daily tour of duty) and the days of an administrative workweek (weekly tour of duty) that are scheduled in advance and during which an employee is required to perform work on a regularly recurring basis.

Transaction Code. Identifies what action has taken place against the position.

Transaction Number/Sequence. More than one action with the same effective date.

Transfer. A change of an employee, without a break in service of one full workday, from a position in one agency to a position in another agency that can be filled under the same appointing authority.

Translate Table. A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases, PeopleSoft maintains the Translate Table.

Travel and Relocation Date. Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.

Two-tier Architecture. Where data storage and processing takes place on a central server (called the Database Server) and business rules and presentation of the data are managed by the individual client workstations.

Type of Appointment. Indicates the specific type of appointment under which the employee is serving.

Unemployment Compensation. An unemployment insurance for Federal employees.

United States Code (USC). Codifies the laws and regulations of the United States.

Veteran. A person who was separated with an honorable discharge or under honorable conditions from active duty in the Armed Forces performed during one of the periods described in 5 USC 2108.

Veterans Preference. An employee's category of entitlement to preference in the Federal service based on active military service that terminated honorably.

Wage Area. A geographical area within which a single set of regular wage schedules is applied uniformly by Federal installations to the covered occupations under the Federal Wage System.

Wage Employees. Federal wage employees or prevailing rate employees. These employees are in trades, crafts, or labor occupations covered by the Federal Wage System and their pay is fixed and adjusted from time-to-time in accordance with prevailing rates.

Waiver of an OPM Qualification Standard. Involves setting aside requirements in a published standard to place an employee in a particular position, usually to avoid some kind of hardship to the employee, such as in cases of RIF or administrative error on the part of the agency. Extra training and/or skills development may be needed to help the employee adjust to the new position. Waivers are granted by OPM or an agency, as appropriate, on a case-by-case basis, and do not directly affect other positions in the organization.

Web Server. A computer that responds to requests from clients and provides the clients with the requested document and its contents.

Web Server Architecture. Technology allowing the network of computers to enable a database to reside in one location on a server and still be accessed simultaneously by multiple users (web) at various remote sites.

WGI Due Date. Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal or excess of allowable leave without pay.

WGI Non-Creditable Days. Total number of days that cause the WGI due date to be adjusted forward.

Web Browser. Basic screen structure of CHRIS.

Within Grade Increase (WGI). An increase in employee's rate of basic pay by advancement from one step of his or her grade to the next after meeting requirements for length of service and performance.

Without Compensation (WC). Under certain circumstances an agency may be authorized to appoint an employee to provide services to the government without pay.

WIP. Work-In-Progress.

WIP Status. The code that tells the PeopleSoft workflow system when and where to send data to the next step of the request/approval or other type of cycle.

WIP Status Type. The code that tracks the action. Each WIP Status is linked to a WIP Status Type. PeopleSoft delivers four different Status Types:

Work-In-Progress **-** A request that has not reached the final level of approval.
Canceled **-** Cancels an action that had been completed.
Corrected **-** HR corrects a completed request.
Completed **-** HR approves a request that has successfully completed all review levels.

Work Schedule. The time basis on which an employee is paid. A work schedule may be full-time, part-time, or intermittent.

14 CHRIS Help

Contents

14.1 CHRIS Hotline

Functional Support

Functional support should be directed to your HR Power User first. The HR Power User at each site has been trained the most extensively and should have the greatest knowledge of the system at that specific site. If the Power User cannot solve your problem, then the Power User should contact the CHRIS Functional Hotline by telephone (304)285-1310 or preferably by e-mail CHRISFUNCTIONAL@netl.doe.gov (it is not case sensitive). Submit all questions/issues to this address instead of a specific individual. The e-mail will be simultaneously received by three members of the CHRIS Functional staff for response. When submitting a question/issue, it is very important to include specific information such as Emplid, effective date of the action in question, detailed information on the issue, and when the action was entered. By using this central e-mail address, delays in answering questions and problems can be avoided when one of the hotline representatives is absent.

Example: An example of functional support would be if you are having problems saving an action or you can’t find the appropriate salary table, or you can’t find the position number you set up. You may be having problems maneuvering through the system. Functional support deals directly with making the action work in the system.

Technical Support

Technical support should always be communicated through your IMPOC. Your IMPOC should be contacted first and if further assistance is needed, the IMPOC personnel can contact the technical support team at NETL via e-mail (CHRIS@NETL.doe.gov), phone (304)285-4729 or fax (304)285-4282.

Example: An example of technical support would be problems getting into the CHRIS system such as unable to logon, unable to print, etc.

CHRIS Homepage

To find out the latest news about CHRIS, check out the homepage at http://chris.inel.gov. Information such as DOE phonebook, what’s new, help, PeopleSoft users, etc., are located on this homepage. You can even reach OPM at the touch of a click. Check it out for handy HR information located on one homepage.

14.2 Establishing, Changing, or Terminating CHRIS User Accounts

Establishing User Accounts

Points of Contact (POC) are responsible for submitting request forms to establish, change, or terminate CHRIS User accounts to the CHRIS Technical Staff. These forms are kept on file as the legal document used to grant users access to personnel data in the CHRIS database. Incomplete forms or forms not signed by an authorized agent will not be accepted, the exception being no employee signature is required on a Termination request**. Warning! An account that exists after an employee is gone poses a security risk.** POCs are accountable for any security breach involving a terminated employees account if the CHRIS Security Administrator is not notified of such termination in a timely manner.

1. POCs will direct users to the online user ID request forms located on the CHRIS web site (http://chris.inel.gov). Instruct users to complete the form(s) online, click the Create Form button, print and sign the form, and present it to the appropriate POC(s) to complete the 'HR/Training Office Use Only' section of the form.
2. POCs will enter access levels required for the user to perform his or her job, the user's EMPLID (employee ID assigned in the CHRIS database), and sign the form.
3. POCs will FAX the completed forms to the CHRIS Security Administrator, (304) 285-4282.
4. The CHRIS Security Administrator will e-mail notices advising the CHRIS Project staff of the new, modified, or deleted user requirement. POCs who submitted the forms will be CC'd on this notice as confirmation of receipt of the request(s).
5. The CHRIS Security Administrator will email new users their User ID and password, in separate emails. Information on how to change the password will also be provided.

If there are any questions, contact the CHRIS Technical Staff at (304) 285-4729; fax at (304)285-4282.
The HR Point of Contact (POC) is responsible for submitting requests to establish, change, or terminate CHRIS User accounts to the designated CHRIS Project staff member or the CHRIS Technical Staff, as directed.